HMIS Project Request Overview

Table of Contents

Overview of the Homeless Management System

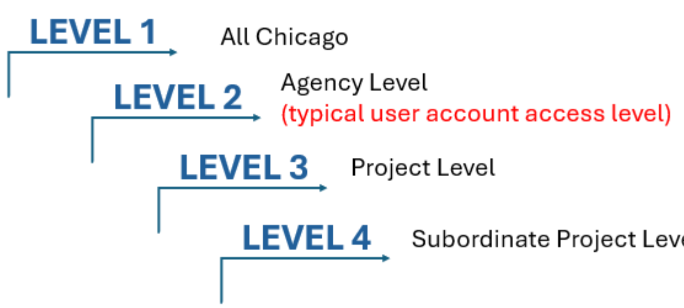
The Homeless Management Information System (HMIS) serves as a critical infrastructure for understanding and addressing homelessness in Chicago. Managed by All Chicago, the HMIS is a robust database that meticulously collects and organizes specific data related to individuals and families experiencing homelessness. The HMIS relies on this data entered by partner agencies to enable a comprehensive view of homelessness by aggregating data across various programs and agencies allowing the CoC to make data-driven decisions.

Clients

Clients in HMIS are identified by a unique number assigned upon creation called a Client ID. This number would follow the client in HMIS as they move through the system. Clients can also be grouped if they are in the same household. These client groups are identified by a unique number called Group ID. Clients can be searched for and identified in the HMIS interface based on the Client ID whereas the Group ID is typically found in HMIS reporting outputs.

Agency and Project

The HMIS uses a tree data structure to organize projects and agencies. All Chicago serves as the Level 1 provider for the continuum, with all other agency/provider activity falling under it. Agencies within the continuum are created under Level 2, where user accounts are assigned, allowing access to all projects under that agency. If needed, user access can be restricted to an individual project at the project level. Projects for the agency are situated at level 3 unless there is multiple funding, in which case a subordinate project can be created under level 4. Creating a level 4 project enables the generation of reports and accounting for both projects collectively. All projects and agencies are given a unique ID number in which the project or agency will be assigned no matter the level it sits. Below is an example of the project structure in HMIS.



Participating HMIS Project

When Participation in HMIS refers to a project's usage of HMIS to record client activity. Typically, projects are labeled as "HMIS Participating" if they collect all required data elements in HMIS according to funder requirements and local CoC Policies and Procedures. If a project serves DV, it is usually required to use a comparable database to record client activity, and these projects will be labeled as "Comparable Database Participating". If a project does not collect all required data elements in HMIS or does not serve DV via a comparable database, then the project will be labeled as "Not Participating".

User Roles

Users of HMIS are agency staff or subcontractors who work for the agency and use HMIS. Each HMIS user must have a role associated with their account. All agencies must have at least one user identified as the Agency Technical Administrator (ATA), who will be designated as the first point of contact to assist users within their own agency. This includes reporting and all other relevant data quality responsibilities. The ATA will also receive email reports from the

HMIS team to assist with data quality for that project. All other staff will be set as a Case Manager or Read-only role. Below is a list of what each role will include:

	Agency Admin (ATA)	**Case Manager I**	**Case Manager II**	**Case Manager III**	**Read Only I**	**Read Only II**	**Read Only III**
View All Projects Under Agency	X			X			
Create/Modify Client Record	X	X	X	X			
View Entry/Exit	X	X	X	X	X	X	X
Create/Modify/Delete Entry/Exit	X	X	X	X			
View Needs/Services/Referrals	X	X	X	X	X	X	X
Create/Modify/Delete Needs/Services/Referrals	X	X	X	X			
Ability to View the Reports Tab and Run Reports (APR,CAPER,..)	X	X	X	X	X	X	X
Generate DFSS Funded BusinessObjects Reports	X						
Access to ShelterPoint	X	X	X	X			

Enrollments and Assessments

Clients newly created or currently available in HMIS can be enrolled into your project via the Entry/Exit. Enrolling a client in the request HMIS project means that the client is actively working with the project. All enrollments will have a start date for when the client first starts working with the project. Entry/Exits allow for interim updates to be added due to client information changing or if required via funding. Clients who are no longer working with the project should have an exit date for when services have ended and a destination for where the client is currently staying. All enrollments will have applicable assessments tied to the project based on funding or project type. The assessments assigned by default will be assessments based on the required HUD 2024 Universal and Program Specific Data Elements. To review these elements please see the FY 2024 HMIS Data Standards Manual. In addition to HUD questions, there are CoC approved questions that are included in these assessments as well. Custom assessments are also available in the system and are typically used if additional questions are required to be completed based on funding.

Inventories

Project inventories in HMIS refer to detailed records of beds and units within residential projects that serve individuals, families, and youth experiencing homelessness. These inventories play a critical role in tracking available resources, managing utilization, and informing decision-making at various levels. Inventories in HMIS should be based on the number of clients the project is funded to serve. Beds in HMIS are intended for individual clients enrolled in a project no matter if they are a single client of an existing family created in HMIS. Units are intended to be the household groups enrolled into a project that is applicable to both single and families. Permanent Supportive Housing projects that are funded by HUD or another federal partner that are dedicated to one or more identified subpopulations will also have these dedicated beds identified in HMIS.

Services / Referrals

In HMIS services provided to clients can be documented via a Service Transaction. The Service Transactions available are based on services the project has identified as being able to provide to clients. Projects have the option to use Service Transactions to help track services being provided if not required to be completed based on funding or project type. Services that are available to choose from in HMIS are from the Alliance of Information and Referral System (AIRS) Taxonomy. In addition to services, referrals can also be created if services are being provided outside of your agency or project. Referrals are typically reserved for the Coordinated Entry process or PATH workflow but can be implemented if needed outside of these examples.

Overview of HMIS Project Creation Process

The project creation process should begin with reviewing the HMIS Project Creation Framework. This document will detail if the project planning to be requested can be created in HMIS without the need for review. Following review or if review was not needed then the project will complete the New Project Creation form. This form is intended to capture all elements needed so that the project can be created by the HMIS team and ensure that the project is set correctly so that access and/or visibility is not restricted. In addition, there could be a need for further review of the project setup which could require a meeting between the HMIS team and the requesting agency. For relatively straightforward project requests (typical funding from HUD) these requests are usually completed no later than 3-4 days from submission.

HMIS Project Creation Framework

As of June 25th, 2024, the HMIS Committee reviewed and approved the HMIS Project Creation Framework drafted by All Chicago as the HMIS Lead. This framework seeks to clarify expectations, HMIS access, and steps to take to address data entry issues. Projects that have funder requirements to use HMIS will be allowed access to HMIS. Voluntary use of HMIS will be assessed using the HMIS Project Creation Framework and will prompt the creation of an MOU between the agency and the HMIS Lead to document why HMIS use is being pursued. If your project falls under Voluntary use, you will need to ensure that answers are available for all Project Assessment questions highlighted in the framework. These framework questions will be asked via the New Project Creation form.

Project Request Form

The Project Creation form is located at the bottom of the New Project Creation helpdesk article and should be completed once all information is known about the project being requested. This form should only be completed by users with a role of ATA, Directors, or Executive Staff within that agency. The form is set to collect all information the HMIS team will need in creating the project. The majority of questions being asked on the form should be sourced from the funding documentation, if funded by the HUD CoC grant, this answer is in your application. Please ensure that the information you provide in the form matches the funding requirements. Inaccurate requests could lead to an improper project setup and impact project operations and report generation. This could also result in not being able to complete or submit required funder reporting, which is a critical part of retaining funding. It is crucial to set up projects accurately from the start to avoid identifying errors after client activity has begun.

Requester Information

This section will capture the information of the person submitting the project creation form and the requirement to use HMIS by a funder. Questions such as Email and Name should reflect the person who is submitting the form. Ensure that the email spelling is correct as this is the email we will use to contact if there are any questions or concerns. For Agency Name, this question should be the name of the agency in which the project requested operates. The HMIS Funder Requirement question will determine the following sections that will be displayed. This question is intended to identify if a project is required by a funder to collect client data in HMIS. This is typically a requirement for all CoC and Federally funded projects. Projects that serve a population of DV where a comparable database will be used will still need to select "Yes" to this question as the project will still need to be created in HMIS although no client activity will be documented.

Funder Information

This section will capture the funding for this project. This information should come directly from the grant documentation. Projects are allowed to have multiple funding sources for one project, but those sources must align when it comes to funders expectations for the project. The initial question regarding Subcontracted or Direct funding is intended to understand the source of the funding. If subcontracted is selected, then a conditional question will ask to select the funder that subcontracted the funding. In cases where a project is funded through the CoC then HMIS setup configurations could differ. For the Funding Sources question, a list of federal and local funding sources that can be selected. If a project receives more than one source of funding, then all funding received should be selected in the pick list. If a funding source is not listed, then select "Other" and manually type in the funding received. When it comes to the Grant Identifier and Grant Dates, this should come directly from the Grant award letter for HUD funded projects. If more than one funding source was selected, then they will need to be listed in the available text box.

Example : HUD - IL12345 ; DFSS - 12345 ; IDHS - 12345 ; VA - IL1234

Project Contact and Location

This section will capture information related to the location of the project, contact persons for when the project is in operation and users that will need to access this project in HMIS. Primary and Secondary contact information should be the person who will be managing or overseeing this project. In addition to the ATA, these contacts might be used in reaching out about the project. Please ensure that the names and emails are spelled correctly. The Project Address and Zip code question should reflect the location of the project. If this project is an ES that is located differently than the agency headquarters, then the address of the project location should be documented. If the project is located at the agency, then the agency address should be used. Project in which housing is scattered sites meaning that there are many locations where clients will be housed then the agency address should be used. The HMIS User Access Question will be used to ensure these users have access to the project being created. Users listed should be done by First and Last name followed by the user's email address (the email should be tied to the agency, for Example; User@agency.org). Users listed should be users already existing in the HMIS. Users who are new to HMIS will need to complete HMIS training before access is granted. Keep in mind that for users to access custom or DFSS required reporting on the project being requested, users will need to have a BusinessObjects license assigned to the account. The Anticipated Operating start date is the date the project anticipates enrolling clients. This date could be changed if operations start at a later date. If a project has started servicing clients prior to requesting a project be created in HMIS and plans to enter this client activity into HMIS, please ensure that the date documented accounts for when this client activity started.

Initial Project Information

This section will capture initial information about the project. This section helps to understand how the project will be configured in HMIS. The Funded Project Name and Desired HMIS Project Name questions are to capture what the project will be called in HMIS and also the name the funder is aware of. The Desired HMIS Project Name question will be the name that will appear in HMIS and also via reporting. This will be the name users will see when enrolling clients and entering data. The name added can be the name that's documented on the grant documentation. If there is a name that this project is referred to internally at your agency, then that name can be added. The Funded Project Name should reflect the name that appears on the grant documentation. This name will be used in cases to match projects in HMIS to the project names understood by funders. The HMIS Participation question is intended to understand how the project will utilize HMIS. For the majority of projects, they will be HMIS participating, meaning that client data will be entered into HMIS under the requested project. Projects that are funded to serve DV in a comparable database and select “No - (DV) Comparable Database Participating” will be asked to document the comparable database used in the following conditional question. If “No - Not Participating” is selected, then the following conditional question will ask about why this project will not use HMIS to document client activity.

Project Information

This section will capture the crucial information about the project. This section will heavily determine how the project is configured, and the assessments/services and workflow tied to the project. The initial Services Provided question provides a list of services most commonly used in HMIS. Select all services that the project will use to document services provided in HMIS. If a service does not appear in the pick list, please select “Other”, then document the service requested. Services documented under “other” will be reviewed and matched to the best AIRS Taxonomy code available in HMIS. The next question is intended to capture DFSS specific program models. Projects that are not funded by DFSS should select “Not Funded through DFSS”. If a project is DFSS funded, then the following conditional question will ask to select the DFSS Program Model for this project. This information should come directly from the DFSS grant documentation. The HUD project type question MUST come from the grant documentation. This is to ensure that the project created in HMIS, and workflow matches what the project is funded for. If the project is DFSS funded, please refer to the HUD Project Type and DFSS Model section of this document to review the crosswalk between DFSS models and HUD Project Types. The Housing Type question will only appear if a housing related HUD Project Type was selected. This question is set to understand the type of housing the project will provide. This should be based on information internally known to the project. For example, if a project is PSH and all housing for clients is located in one building managed by the project then the Housing Type should be Site Base Single Site. If housing is at more than one location and managed by the project, then the type should be Site-based - Clustered/ Multiple sites. If not managed by the project, then Tenant-based - Scattered Site.

Bed and Unit Inventory

This section will collect the Inventory that will be tied to the project for housing related project types. In this section, Beds and Units will be documented, and the breakdown of those units by Household type. Below is how beds and units should be understood:

- Units: Units should be viewed as the count of households that can be served. If the project is serving Single clients, then the Unit and Bed inventory Must be 1:1
- Beds: Beds should be viewed as the count of individual clients that can be served. If the project is serving Families, then the Unit and Bed inventory Can Not be 1:1

If Beds or Units are unavailable for a particular household type 0 should be added to the text field. Keep in mind that individual counts of Units or Beds by household type should equal the number added for the “Total Bed and Total Unit” questions.

Below is an example of how the totals should appear in the form. There should be no case where the household type is greater than the total.

28. Number of Units for Households with at least one adult and one child (Family) *

Please indicate if units are available for this type of Household. If not applicable indicate "0"

5

29. Number of units for Households without children (Singles) *

Please indicate if units are available for this type of Household. If not applicable indicate "0"

15

30. Number of units for Households with only children (Minors) *

Please indicate if units are available for this type of Household. If not applicable indicate "0"

0

31. Total Number of Units *

Please identify the total number of units for the project. This should be a cumulative total of units based on what was identified for each Household type.

20

Permanent Supportive Housing Dedicated Beds

This section will capture bed dedications for Permanent Supportive Housing projects. If the project is funded to have dedicated beds for a specific sub-population. If the project does not have beds for a specific subpopulation question, then "0" should be added to the text field. If the project does have beds for a specific sub-population, then the number of beds dedicated to that population should be added. This number cannot be greater than the total number of beds added in the Beds and Unit List section. If the project has beds dedicated to more than one sub-population then enter the number of beds for each sub-population question. Keep in mind that the total of beds for sub-populations cannot be greater than the total number of beds added in the Beds and Unit List section.

Funding

Understanding funding is an important part of the project creation process. Funding typically dictates the way a project will be created in HMIS. There are many different funding sources a project could have and depending on the source it will typically dictate the way a project will be created in HMIS. Below is a list of the most common funding sources for our continuum. Funding sources not listed are not an indication that it will not be accepted. Projects are allowed to have multiple funding sources for one project, but those sources must align when it comes to funders expectations for the project. For example, if a project receives funding from HUD and also through IDHS for an Emergency Shelter project, then this would be allowed since both funding is for Emergency Shelter. This would also be true for projects funded through a federal partner and Individual/Private donations. Projects where the funding conflicts (Ex. RRH and TH) would require two separate projects, which can be accomplished by completing two separate Project Creation Forms. This would also be true for HUD funded projects funded as a Joint Component TH/RRH project.

Common Funding Sources

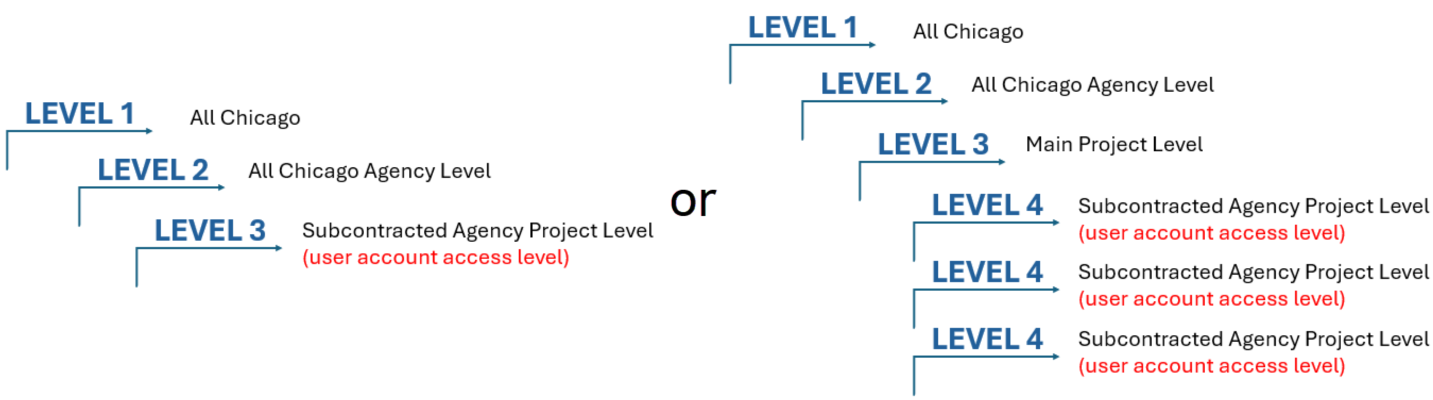
HHS: RHY – Basic Center Program (prevention and shelter)	HUD: HOPWA – Permanent Housing Placement
HHS: RHY – Transitional Living Program	HUD: Unsheltered Special NOFO
HUD: CoC – Joint Component TH/RRH	VA: Grant Per Diem – Clinical Treatment
HUD: CoC – Permanent Supportive Housing	VA: Grant Per Diem – Service Intensive Transitional Housing
HUD: CoC – Rapid Re-Housing	VA: Grant Per Diem – Transition in Place
HUD: CoC – Safe Haven	VA: Supportive Services for Veteran Families

HUD: CoC – Transitional Housing	DFSS: Chicago Department of Family and Supportive Services
HUD: ESG – Emergency Shelter (operating and/or essential services)	IDHS: Illinois Department of Human Services
HUD: ESG – Rapid Re-Housing	CDPH - Chicago Department of Public Health
HUD: ESG-CV	IDPH - Illinois Department of Public Health
HUD: HOPWA – Permanent Housing (facility based or TBRA)	ARPA - American Rescue Plan Act

Direct vs Subcontracted Funding HMIS Structure

Funding can be distributed to agencies in different ways, which can result in how the project is created or categorized in HMIS. The most common to our continuum is subcontracted and direct funding. Direct funding would be funding that the agency received directly from the original funder. This type of funding is typically allocated through grants or contracts where the recipient agency is directly responsible for fulfilling the terms and conditions of the funding. This would be the case for grants awarded directly from HUD, RHY, VA, or HOPWA. Local/state funding could also be considered direct funding if that funding is not a result of a subrecipient situation. Subcontracted funding would be funding that the agency receives as a result of funds distributed through an intermediate organization/agency. This would be the case for CoC funded projects, where funding is awarded to All Chicago and distributed to agencies. Another example would be HOPWA funding awarded to IDHS and distributed to agencies.

In cases where the project is funded through the CoC as a sub-recipient, the project will be created under the All Chicago level 2 agency in HMIS. This allows for All Chicago to complete federal reporting on the project and monitor the activity. User access for data entry will be created at the project level. Users with existing HMIS accounts will receive a new account specifically for the sub-contracted project. Below is an example of the project structure in HMIS.



Information Sourced from Grant / Contract

When completing the project request form, a lot of information can be sourced from the contract or grant as it should provide comprehensive details that define the scope, expectations, and requirements of the project. Below is a list of the valuable information that needs to come from the contract or grant:

Information	**Notes**
Project Alias	This would be the name of the project as it reads on the documentation
HUD Project Type	The specific category of the project, such as emergency shelter, transitional housing, permanent supportive housing, etc.
Target Population	This refers to the specific group of individuals that the project is designed to serve.
Funding Source	This refers to the source of the funding whether direct funding or subcontracted.
Grant / Contract Identifier Number	This refers to the Identifier number on the documentation

Funding Start and End Date	This refers to the date funding services will start and end
Bed / Unit Inventory	This refers to the number of clients expected to be served during the grant period or the number of clients the caseload should maintain.

HUD Project Type and DFSS Model

All projects in HMIS must fall within one of the HUD project types even if not funded through HUD. This is to ensure that HMIS data aligns and is accurately representative of all projects in federal reporting and system-wide analysis. Projects funded directly through a federal partner should have this information explicitly clear in the grant documentation. Projects funded through other sources might have to choose a HUD type that is applicable to the work of services being given. In those cases please refer to our helpdesk article that details the various HUD types. Information regarding funding types can also be found in the FY 2024 HMIS Data Standards Manual.

DFSS

Although projects are required to have a HUD project type assigned to their project, in the case of DFSS funded projects this project type will depend on the DFSS Model. DFSS funded projects should be explicitly clear about what the model is for the project. If a project is funded by HUD and DFSS then their HUD project type should take precedence. Below is a crosswalk of the DFSS model to the HUD Project Types.

DFSS Program Model	**HUD Project Type Code**
• Centralized Shelter Intake	• Other (HUD
• Coordinated Entry System Facilitator	• Coordinated Entry (HUD)
• Drop-In Centers & Drop-in Centers Youth	• Day Shelter (HUD)
• Flexible Housing Pool	• PH – Rapid Re-Housing (HUD) • Transitional Housing (HUD) • Street Outreach (HUD) • PH – Housing with Services (no disability required for entry) (HUD)
• Frequent Users Service Engagement (FUSE)	• Services Only (HUD)
• Homeless Prevention	• Homeless Prevention (HUD)
• Housing System Navigators	• Coordinated Entry (HUD)
• LTRA	• PH – Permanent Supportive Housing (disability required for entry) (HUD)
• Ongoing Initiatives	• PH – Permanent Supportive Housing (disability required for entry) (HUD)
• Rapid Rehousing Program Coordinator	• PH – Rapid Re-Housing (HUD)
• Safe Haven	• Safe Haven (HUD)
• DV Shelter • Shelter for formerly incarcerated • Shelter for medically vulnerable • Shelter serving families or families and single adults • Shelter serving single adults • Youth Shelter	• Emergency Shelter – Entry-Exit (HUD) • Emergency Shelter – Night-by-Night (HUD) • Transitional Housing (HUD) (only if also HUD funded)
• Youth Transitional Housing	• Transitional Housing (HUD)
• Street Outreach • Street Outreach – Youth	• Street Outreach (HUD)

Chicago Program Model – Youth TH

The CoC established youth-appropriate housing models, one of which is Youth Transitional Housing. Projects that receive funding for Youth Transitional Housing will have this information recorded in the project setup in HMIS. This inclusion ensures that the project is part of all relevant CoC youth reporting.

Special Population

Special populations refer to groups within the homeless community that have unique needs and may require targeted services. These populations often face additional barriers to housing and support due to various factors such as age or specific life circumstances. This is important information in creating the project as it could dictate if client data is added to HMIS, or if visibility needs to be adjusted to ensure certain population data is secured.

DV: Survivor of Domestic Violence

Projects typically are required to use a comparable database to collect client data if funded to serve DV clients. An example of a comparable database that's typically used is ICarol. We would still require that a project be created in HMIS as a placeholder for reporting purposes. So, although the project will exist in HMIS no client-level data will be entered.

HIV: Persons with HIV/AIDS

Projects funded with a target population of HIV, typically projects funded through HOPWA, are usually required to enter data into HMIS. These projects could be configured so that that visibility to client enrollment into that project is not visible outside of the agency.

Youth: Persons Under the Age of 25

Projects funded to serve Youth are projects intended for clients under the age of 25 who may be unaccompanied and require age-appropriate services and support. This target population will dictate the dedicated bed inventory of the project's Permanent Housing.

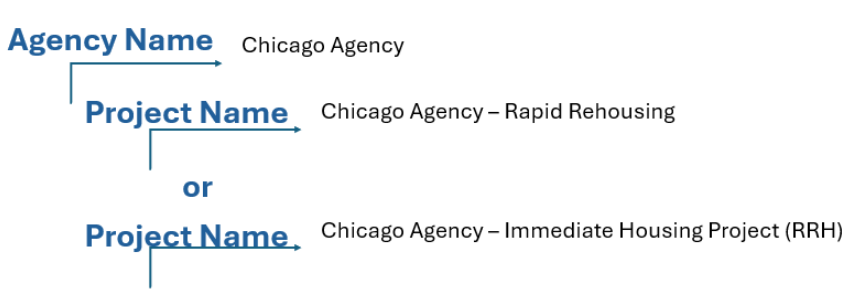
Project Details

All HMIS projects must have project-specific data tied to the project. This includes the name of the project, the main contact and location, and the type of house provided. In addition, the project will have a date set in HMIS for when the project first starts operating.

Project Name

In HMIS the project names are set so that the agency name will come first then the selected name of the project. This is done so that identifying projects within an agency is clear. When selecting a project name keep in mind that it does not need to be the same as what is identified on the grant contract, although this is the case for the project alias name. Most commonly the project name often will either include the type of project or the name used internally within the agency. Be sure to review the spelling of the name as it will be included as requested.

<u>Example</u>



It is to be noted that the project name will not be changed based on funding changes, although a new project request should be completed.

Project Alias Name

The project alias should reflect the name of the project as it appears on the grant document. Including this is to ensure that projects can be matched based on the project name understood by the funder. This is mainly the case for local funding such as DFSS as it is imperative to ensure that projects are easily identifiable.

Contact & Location Information

HUD requires that the location of all projects is identified in HMIS. This included the full address of the project's principal site or, for scattered site projects, the address in which most of the project's clients are housed. For tenant-based scattered site projects or VSPs, the administrative address may be used. HMIS also requires that at least one contact person for the project is identified. This could be the director or manager overseeing the project. This allows HMIS to have a point of contact for data concerns or updates about the project.

Housing Type

The housing type is only applicable to residential project types. This would include ES, TH, PSH, RRH, and SH. Housing types are categorized based on the location and nature of the housing provided to clients. The two primary categories are site-based and tenant-based housing. Below is a description of the three housing types:

Site-based - Single Site	All clients are housed in a single project facility.
Site-based - Clustered/ Multiple sites	Clients are housed in more than one project facility in multiple locations, but more than one client is housed in each project facility. The facility locations are owned, operated, or sponsored by the project.
Tenant-based - Scattered Site	Clients have leases or other occupancy agreements and are housed in residences that are not owned or managed by the project.

Operating Start Date

The operating start date defined by HUD is "the first day on which a project provided (or will provide) services and/or housing. Projects that are fully funded but have not yet begun operating may be entered with a future project start date that reflects the date the project will begin providing services.". At the time of completing the Project request form, the operating start date will likely be volatile as this could depend on the completion of the project being created in HMIS, the training of staff, or the case of a unique project the creation of a workflow. When choosing the operating start date, please choose a future date of the request. This date can be updated if the project is not ready to operate.

Bed/ Unit Inventories

Bed and Unit inventory is required for residential projects that enter data into HMIS as well as non-participating projects such as DV. Accurate inventory information is crucial as it helps to understand the project's capacity for PH projects receiving clients from coordinated entry and also helps understand available resources within the continuum. Inventory information should be sourced directly from the grant document so that the project represents the expectation from the funder. In most cases, the project inventory should not change between the grant year as the inventory should always reflect current funding. Also, the grant information should identify the household type the project will be serving; this includes serving single, families or youth clients. For ES and TH, the availability of beds whether seasonal or year-round, and also the bed type whether voucher or facility base will also need to be identified.

Housing Type

When reviewing the project inventory it is important to understand the types of households the project will be serving such as singles, families, or child-only households. Projects could serve a combination of households including beds for singles and families. Each unique household type will be reflected in HMIS individually if applicable to the project.

Household Type	Description
Singles - Households without children	Beds and units typically serve households with adults only. This includes households composed of unaccompanied adults and multiple adults.
Families - Households with at least one adult and one child	Beds and units typically serve households with at least one adult and one child.
Child Only - Households with only children	Beds and units typically serve households composed exclusively of persons under age 18, including one-child households, multi-child households, or other household configurations composed only of children.

For each unique household type, allocated beds for that type will need to be identified. For example, if the total number of beds funded is 80 and the project will be serving both singles and families then the 80 beds will need to be broken down based on the number of beds for singles and the number of beds for families, 40 single beds and 40 family beds. When thinking about the breakdown between beds, beds should be thought of as individual clients within the project. For single beds, the unit count will always be 1:1 with the number of beds. An example would be if there are 40 total single beds then there would be 40 single units. When it comes to units related to family beds then the unit count will always be lower than the total count of beds. Units should be viewed as the number of family units the project will serve. For example, if the project has 40 total beds then the units would be 20, if the expectation is that each household would consist of 1 adult and 1 child. For families, the number of units should be based on the expectations of the project. Once the breakdown is identified be sure that the total beds of each unique household type totals the number of beds to contract.

Dedicated Beds (PSH)

Dedicated beds are a specific classification of bed inventory that is reserved for individuals who belong to a particular subpopulation category or their household members. A dedicated bed must be filled by a person who belongs to the subpopulation category or a member of their household. Dedicated beds are typically reserved and often required for Permanent Supportive Housing projects. Projects can have multiple bed dedications or isolate beds for dedication in HMIS without the need for a new project inventory to be created. For example, a project can have a total of 40 single beds where 30 are dedicated to a subpopulation and 10 are classified as non-dedicated. Ensuring accurate bed dedications amongst all applicable projects helps contribute to the accuracy of resources available with the CoC.

<u>Dedicated beds as they appear in HMIS:</u>

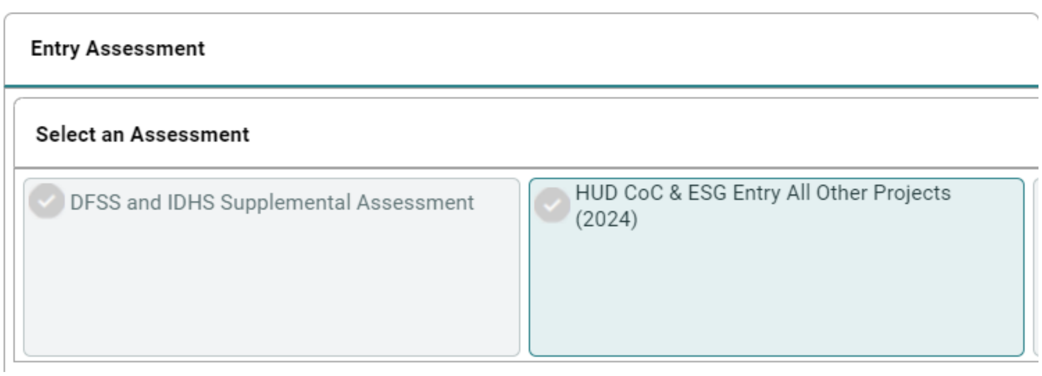
Chronically Homeless Veteran Bed Inventory	The number of beds that are dedicated to house Veterans experiencing chronic homelessness and their household members
Youth Veterans Bed Inventory	The number of beds that are dedicated to house youth (persons up to age 24) Veterans experiencing homelessness and their household members.
Any Other Veteran Bed Inventory	The number of beds that are dedicated to house Veterans who are not youth and not experiencing chronic homelessness and their household members.
Chronically Homeless Youth Bed Inventory	The number of beds that are dedicated to house youth (persons up to age 24) experiencing chronic homelessness and their household members.
Any Other Youth Bed Inventory	The number of beds that are dedicated to house youth (persons up to age 24) experiencing homelessness who are not Veterans and are not

	experiencing chronic homelessness, and their household members.
Any Other Chronically Homeless Bed Inventory	Beds dedicated to non-youth, non-Veteran persons experiencing homelessness. The number of beds that are dedicated to housing persons experiencing chronic homelessness and their household members.
Non-dedicated Bed Inventory	All other (non-dedicated) beds not already accounted for in dedicated bed fields.

Enrollment Assessments

Within HMIS client activity is tracked via Entry/Exit enrollments into the project. A part of the enrollment process is the completion of assessments, this is where client data is collected. Standard assessments typically tied to all projects in HMIS are primarily based on HUD universal and program-specific data elements. This is to ensure that data collected across all project types meets the HUD data collection requirements. Some assessments that are tied to projects could also include Federal Partner Program Specific Data Elements depending on funding. Custom questions approved by the continuum do appear on these standard assessments, but they appear as non-required questions where all HUD questions are set as required. Enrollments in HMIS are based on an Entry, Interim, and Exit with each point having an assessment tied.

The HMIS does allow for custom assessments to be created, such as the case for DFSS or IDHS funded projects. These assessments would be in addition to the standard assessments that contain the HUD required questions. These assessments appear as an additional tab during enrollment and require the users to manually access it. Custom assessments can be created but are limited to unique project workflows that require additional data to be collected. In cases where custom assessments are appropriate, custom reporting should also be considered so that the project can review this additional data outside of HMIS.



HUD Assessments

The assessments associated with projects are standard HUD-based assessments, which can vary depending on the project type or funding source. All HUD assessment questions used in HMIS can be viewed in detail via the FY 2024 HMIS Data

Dictionary. In HMIS, these assessments are named in a way that clearly indicates that they are the most recent HUD assessments. The names of the assessments should begin with HUD, HHS, or VA and all end with the most recent data standard year, which is currently 2024. Below is a list of the current assessments:

Project Type	**HMIS Assessment**

• PH – Permanent Supportive Housing (disability required for entry) • PH – Housing Only • PH - Housing with Services (no disability required for entry) • PH – Rapid Re-Housing • Day Shelter • Transitional Housing • Services Only	**ENTRY:** HUD CoC & ESG Entry All Other Projects (2024) **INTERIM:** HUD CoC & ESG Update (2024) And **INTERIM:** Annual Assessment (2024) **EXIT:** HUD CoC & ESG Exit (2024)
• Emergency Shelter – Entry Exit • Emergency Shelter – Night by-Night • Street Outreach • Safe Haven	**ENTRY:** HUD CoC & ESG Entry SO ES SH (2024) **INTERIM:** HUD CoC & ESG Update (2024) **EXIT:** HUD CoC & ESG Exit (2024)

Funding Source	**HMIS Assessment**
• HUD: HOPWA – Hotel/Motel Vouchers • HUD: HOPWA – Housing Information • HUD: HOPWA – Permanent Housing (facility based or TBRA) • HUD: HOPWA – Permanent Housing Placement • HUD: HOPWA – Short-Term Rent, Mortgage, Utility assistance • HUD: HOPWA – Short-Term Supportive Facility • HUD: HOPWA – Transitional Housing (facility based or TBRA) • HUD: HOPWA-CV	**ENTRY:** HUD HOPWA Entry All Other Projects (2024) Or **ENTRY:** HUD HOPWA Entry for ES (2024) **INTERIM:** HUD HOPWA Update (2024) And/or **INTERIM:** HUD HOPWA Annual Assessment (2024) **EXIT:** HUD HOPWA Exit (2024)
• HHS: PATH – Street Outreach & Supportive Services Only	**ENTRY:** HHS PATH Entry for SO (2024) Or **ENTRY:** HHS PATH Entry for SSO (2024) **INTERIM:** HHS PATH Annual Assessment (2024) And/or **INTERIM:** HHS PATH Update (2024) **EXIT:** HHS PATH Exit (2024)
• HHS: RHY – Basic Center Program (prevention and shelter) • HHS: RHY – Maternity Group Home for Pregnant and Parenting Youth • HHS: RHY – Transitional Living Program • HHS: RHY – Street Outreach Project • HHS: RHY – Demonstration Project	**ENTRY:** HHS RHY Entry for SO and ES (2024) Or **ENTRY:** HHS RHY Entry for TH and HP (2024) **INTERIM:** HHS RHY Update (2024) **EXIT:** HHS RHY Exit (2024) **Post Exit:** HHS RHY Post-Exit (2024)
	ENTRY: HUD VASH Entry (2024)

• HUD: HUD/VASH • VA: CRS Contract Residential Services • VA: Grant Per Diem – Bridge Housing • VA: Grant Per Diem – Low Demand • VA: Grant Per Diem – Hospital to Housing • VA: Grant Per Diem – Clinical Treatment • VA: Grant Per Diem – Service Intensive Transitional Housing • VA: Grant Per Diem – Transition in Place • VA: Grant Per Diem – Case Management/Housing Retention • VA: Community Contract Safe Haven Program • VA: Supportive Services for Veteran Families	Or **ENTRY:** VA GPD CCSH CRS Entry (2024) Or **ENTRY:** VA SSVF Entry for HP and RRH (2024) **INTERIM:** HUD VASH Update (2024) And **INTERIM:** HUD VASH Annual Assessment (2024) Or **INTERIM:** VA GPD CCSH CRS Update (2024) And **INTERIM:** VA GPD CCSH CRS Annual Assessment (2024) Or **INTERIM:** VA SSVF Update (2024) And **INTERIM:** VA SSVF Annual (2024) **EXIT:** HUD VASH Exit (2024) Or **EXIT:** VA GPD CCSH CRS Exit (2024) Or **EXIT:** VA SSVF Exit (2024)

Custom Assessments

Custom assessments can be created and included in unique projects that require additional data to be collected on clients outside of the standard HUD questions. If the project is identified to be a unique case, an additional assessment with custom questions can be added. Before an assessment can be created the project needs will need to be reviewed. This is to ensure that additional questions being requested do not fall in line with already asked questions in the system. Doing so helps ensure that there are no duplicate or very similar questions being asked which results in overall inconsistent system data.

Questions to review before Custom Assessment request:

1. The HMIS is not HIPPA compliant and is not intended to store medical related data. Does the custom question contain medical data?
2. Can the information I'm seeking via a custom question be gathered from an existing [HUD Universal, Program Specific, or Federal Partner Data element]() currently available in HMIS?
   2.1. For example, if the request is for an annual income question, this information can be gathered by calculating the existing monthly income data.
3. What is the purpose of the information being gathered?
   3.1. Custom additional questions should have a benefit for it to be included in HMIS whether that's a better understanding of the clients being served or assisting in the service of clients.
4. How will these additional questions be used in evaluating the project?
   4.1. The HMIS is not intended to be a database replacement for the agency's internal database. Custom questions should be reserved for data that will be reviewed /monitored or could serve as an alert to other services needed.

Configurations

Assessments can be configured in many ways including text box responses, custom picklists, and requirement settings. When thinking about the custom questions, you would want to identify the preferable responses or response mechanism. If responses should be hard set, then a custom picklist would need to be created with the requested responses. Yes or No questions utilize the HUD Yes/No picklist for data consistency. Text box responses can also be added but are not encouraged as data typically becomes difficult to review as responses vary widely. We strongly encourage that in addition to the questions appearing in the assessment, details about the question should be included. This is to assist users who are completing the assessment to understand what is being asked. This help text is set in the assessment as a section header or as pop-up text if the cursor hovers over the question. The HMIS is unable to create condition questions or scoring-related questions. Although scoring could potentially be accomplished via custom reporting. All custom questions will be reviewed by the HMIS team to ensure that there is not an existing question that could be used to source the desired data.

Service Transactions

Service Transactions can be implemented into any project in a few ways. One is that services can be added to a project for users to select from when identifying services provided to clients. Another way is that services can be created to indicate a shelter stay in the project. The use of this type of service is a requirement for Emergency Shelter – Night by Night project types. Referrals can also be utilized by the project, which utilizes the same AIRS Taxonomy as a traditional service transaction. Referrals are a way to indicate that services are going to be provided elsewhere. The use of referrals is a requirement for PATH funded projects but is commonly used in the CE process. When identifying services that should be tied to the project review the type of services that are going to be offered by the project. When completing the Project creation form you can select from common services to the system. If a service that is going to be provided by the project is not listed, "Other" should be selected and type in the type of service requested. The HMIS team will match it to an available AIRS Taxonomy in the system.

DFSS Funded – System Navigation

Projects funded through DFSS as System Navigation will have a preset list of services tied to the project. These services are to be used so that services provided to clients can be easily matched by providers to the manual services list in the quarterly reporting. Listed below are services that will be added for DFSS funded System Navigation projects.

1. Case/Care Management PH-1000
2. Financial Management Support TP-2100
3. Life Skills Education PH-6200.4600
4. Counseling Services RP-1400
5. Alcohol-Related Harm Reduction Programs RX-8470.0500
6. Child Care Providers PH-1250
7. Child Advocacy Centers FT-3000.1450
8. Domestic Violence Intervention Programs FF-0500.9100-180
9. Education H
10. Employment ND
11. English as a Second Language HH-0500.8000-150
12. Health Care L
13. AIDS/HIV Clinics LT-1750.0500
14. Housing/Shelter BH
15. Mental Health Support Services RR
16. Legal Services FT
17. Outreach Programs TJ-6500.6300
18. Substance Use Disorder Services RX
19. Transportation BT

Shelters (ShelterPoint)

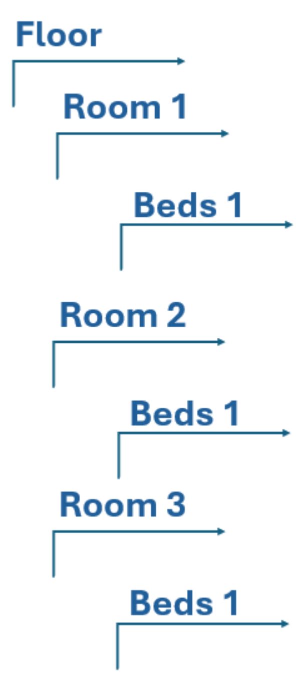
In addition to enrollments, the Shelters function in HMIS is designed to help track client activity via a manual list. The use of the Shelters function will not replace the need for clients to have completed enrollments into the project. The Shelters function is typically used by Emergency Shelters Night by Night projects but can be used for any project type. In most cases, the shelter point unit list is configured identically to the number of beds assigned to the project's inventory but could be a greater number if the project has available beds that are not funded and not reported in the project inventory. For Emergency Shelters usage of the Shelters function could assist with a project being able to check in clients quickly that have already been enrolled in the project. This allows the project to quickly see all clients on site for the night. Clients who are checked in via the Shelters function will have a service transaction created for the time the client stays at the shelter. These service transactions are typically not counted toward reporting except for the annual Point In Time count where shelter stay data will be captured for Emergency Shelter Night by Night projects.

Bed Unit Structure

The Bed and Unit structure for the Shelters function in HMIS can be configured in many ways that best support the way the project would like to collect this data. This means that Units can be configured to represent individual rooms with a certain number of beds attached to each unit. This would be the case if the project is trying to match the physical accommodation of the facility. For example, if the project is funded to serve 10 beds and 5 units then the Shelter unit list can be set up so that there are 5 Units with 2 Beds under each. This would mean that households checked in would need to be a count of 2 so that there is no overlap into other units. The shelter unit list can also be configured so that all beds show up under 1 unit. Some projects are configured this way for ease of use if the data wanting to be captured is solely related to the beds of the project. Again, the Shelter function in HMIS does not overwrite or supersede the Project Inventory record.

Example of a Unit List where all beds fall under one "Unit"

Example of a Unit List where beds fall under a specific "Unit"



CE Participation and Client Acquisition

Client acquisition into your project will primarily depend on the HUD Project Type of the project. Projects such as Emergency Shelter, Street Outreach, or Day Shelters typically work with clients who are sourced outside of the HMIS system. This means that clients are not referred to the project via an HMIS referral. These projects will often have first-time clients to HMIS and a client record with a unique client ID number will need to be created. Housing projects such as Permanent Supportive Housing, Rapid Rehousing, or Youth funded Transitional Housing are required to work with clients referred through the Coordinated Entry process. This means that all clients that will work with this project will be already in the system with a unique client ID number. There will be no need to create new client records. Housing projects will need to complete the Project Eligibility Details Form so that clients referred will best meet the project eligibility requirements such as income, household type/size, and available housing. This will also need to be completed in the future if the project has any significant eligibility changes.

Reporting

Reporting in the context of HMIS can be viewed in two different ways, Operational Reporting and Funder Required Reporting. Both will need to be used as the project operates and utilize HMIS. Operational reporting refers to reports that can be generated from HMIS data that are used to ensure data quality and could assist in how the project operates. Funder Required reports are reports that will need to be submitted from HMIS to the funder. Reports in HMIS can range from canned reports which are reports created by the vendor or custom reports via BusinessObjects. BusinessObjects is a reporting addition to HMIS which allows next-day data reporting from HMIS.

Operational Reporting

Custom Reporting

In situations where there is a custom workflow/ assessment, there will likely be a need for custom reporting. This reporting would include any custom assessment, referrals, or questions unique to this project. Since BusinessObjects offers a variety of available reports for common elements in HMIS. Custom reporting should not be requested if reporting exists that can be used to capture the data needed. Custom reports can be done either in BusinessObjects or the CoC SQL database which offers more customizations to reporting and delivery. All custom data reports will need to be requested via the Data Request Prioritization Tool and Framework. This will determine when and if the request will be completed. Prior to submitting a request, please ensure to review the data points needed in the report in addition to the purpose of the report. Once the initial request has been approved, prior to work beginning on the report we will reach out to the contact person on the request to review.

Accessing custom reports in BusinessObjects requires the user to have a reporting license assigned to the HMIS account. ATAs can email Helpdesk@allchicago.org to request BusinessObjects access for HMIS users at their agency. BusinessObjects access should only be reserved for users at your agency that require reporting access. License requests from agencies that have a high percentage of users with access to BusinessObjects already will likely need to be reviewed by the HMIS team.

Funder Required Reporting

In most cases, all projects funded through a Federal or local funding source are required to submit reports on the performance of the project. HUD funded projects typically are required to submit an Annual Performance Report (APR) to report on the performance and outcomes of their projects. In some cases, submission of the Consolidated Annual Performance and Evaluation Report (CAPER) could be required. Other federal funders such as the Department of Veterans Affairs (VA), Projects for Assistance in Transition from Homelessness (PATH), or Runaway and Homeless Youth (RHY) also have required reporting. These reports can be generated for users with an HMIS role of Case Manager 3 or Agency Technical Administrator (ATA).

Projects funded through DFSS are required to complete the Quarterly, Performance, or Carryover reports depending on the DFSS Model. These reports are available in BusinessObjects and available to users with a BusinessObjects license.

HUD Reporting Resources

APR and QPR - Details on how these reports are submitted in SAGE can be found here.

CAPER - Details on how ESG funded reports are submitted in SAGE can be found here.

VA - Details on how VA funded reports are submitted in the VA Repository can be found here.

PATH - Details on how PATH funded reports are submitted in the PATH Data Exchange (PDX) can be found here.

RHY - Details on how RHY funded reports are submitted in the RHY-HMIS Repository can be found here