



Agency Administrators Meeting

October 5, 2017



Agenda

1. CoC / Coordinated Assessment / UPLIFT Updates
2. 2017 Data Standards Reminders
3. New CCP Workflow Reminders
4. Standardized Financial Services for Rapid Re-Housing and Homelessness Prevention
5. Looker Report: Expiring ROIs
6. CDQI: AHAR

**CoC /
Coordinated Assessment /
UPLIFT Updates**



2017 Data Standards Review



What are the HUD HMIS Data Standards?

The HMIS Data Dictionary and the HMIS Data Standards Manual are the documentation of requirements for the programming and use of all HMIS systems and comparable database systems.

The most recent version of the Data Standards are effective October 1, 2017.

Full Data Standards are available here:

<https://www.hudexchange.info/resource/3824/hmis-data-dictionary/>




Important Changes - PH Projects

3.10 Project Start Date and 3.20 Housing Move-In Date changes

- Residential Move-In Date was renamed **Housing Move-In Date** and is now **required for ALL PH programs** (Rapid Re-Housing, Permanent Supportive Housing, PH - Housing with Services, PH - Housing Only)
- **Clients in these projects will be enrolled before they move into housing:**
 - Client meets criteria for admission
 - Client wants to be housed in the project
 - Client able to access services and housing through the project
- For all enrollments (except RRH) before 10/1, the Housing Move-In Date will updated to match the Project Start Date

For CCP projects, additional workflow changes and mapping will take place



Project Start Date - Full PH Definition

For all types of Permanent Housing, including Rapid Re-Housing:

1. Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered)
2. The client has indicated they want to be housed in this project
3. The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time



Project Start Date - Additional Definitions

- **Street Outreach** – date of first contact with the client
- **Emergency Shelters (Entry-Exit)** - the night the client first stayed in the shelter. If the client exits and then enters at a later date, a new enrollment is started.
- **Emergency Shelters (Night-by-Night)** - the night the client first stayed in the shelter. These projects have a bed-night tracking method. Clients can re-enter as necessary without “exiting and restarting” for each stay.
- **Safe Havens and Transitional Housing** – the date the client moves into the residential project (i.e. first night in residence).
- **For all other types of Service projects** - date the client first began working with the project and generally received the first provision of service.



Important Changes - Project Setup

2.8 Additional Project Information - new fields, newly required fields

- Added Geography Type (Urban, Suburban, Rural) based on Zip Code
- Added Housing Type (Site-based single site, Site-based multiple sites, Tenant-based scattered site)
- Information will be used for HIC and AHAR starting in 2018

2.7 Bed/Unit inventory is being restructured

2.6 Funding Source - new, renamed and removed options

Bitfocus will be contacting agencies to verify information where it is necessary



Notable Changes - Housing Status

4.1 Housing Status is being retired

Bitfocus will be working with projects that use Housing Status for their reporting and program monitoring:

- UPLIFT's eligibility questions will be updated to ask if the client is homeless
- Homeless Prevention reports will be adjusted to remove Housing Status (D:H and OSH grants)

If your agency uses the Housing Status field for any reporting and you'd like assistance with your reports, please let Bitfocus know



Notable Changes - Disabling Conditions

In the Disabling Conditions and Barriers section, **'Receiving Services' and 'Documented' fields have been removed for Data Elements 4.5 - 4.10:**

Physical Disability	Select ⌵	Long Term	Select ⌵
Developmental Disability	Select ⌵	Substantially Impairs Independence	Select ⌵
Chronic Health Condition	Select ⌵	Long Term	Select ⌵
HIV - AIDS	Select ⌵	Substantially Impairs Independence	Select ⌵
Mental Health Problem	Select ⌵	Long Term	Select ⌵
Substance Abuse Problem	Select ⌵	Long Term	Select ⌵



Additional Changes - Part 1

- **3.6 Gender options renamed**
 - “Transgender male to female” renamed to “Trans Female (MTF or Male to Female)”
 - “Transgender female to male” renamed to “Trans Male (FTM or Female to Male)”
 - “Doesn’t identify as male, female, or transgender” renamed to “Gender Non-Conforming (i.e. not exclusively male or female)”
- **3.16 Client Location required only for Head of Household**
 - Updated to match HUD Data Standards
- **3.12 Destination options updated**
 - New dropdown option: “Rental by client, with RRH or equivalent subsidy”
 - “Permanent housing for formerly homeless persons” renamed to “Permanent housing (other than RRH) for formerly homeless persons”



Additional Changes - Part 2

- **3.917 Type of Residence options renamed**
 - “Permanent housing for formerly homeless persons” renamed to “Permanent housing (other than RRH) for formerly homeless persons”
 - “Rental by client, with other ongoing housing subsidy” renamed to “Rental by client, with other housing subsidy (including RRH)”
- **4.2 Income, 4.3 Non-Cash Benefits, and 4.3 Health Insurance fields reworded**
 - Wording changed to match exact phrasing in Data Standards
- **4.3 Non-Cash Benefits - two fields removed**
 - Section 8
 - Temporary Rental Assistance



Program Specific Changes

4.12 Contact Services (for PATH, CoC/RHY Street Outreach and ESG Night-by-Night Shelters)

- Moving from “Location of Contact” to “Staying on Streets, ES or SH”
- New Contact service items added and existing Contact services Retired as of 10/1/2017

PATH - no significant changes

HOPWA - no significant changes



Program Specific Changes - RHY

- Several elements streamlined:
 - **R1 Referral Source** streamlined
 - **R13 Young Person's Critical Issues** streamlined to Family Critical Issues
 - **R17 Project Completion Status:** Major Reason (Voluntary) Removed
 - **4.38 Family Unification Achieved** retired
- **R4 Last Grade Completed, R5 School Status, R6 Employment Status** now collected at project exit in addition to entry
- **R15 & R16 Sexual or Labor Exploitation** moved from project entry to project exit
- **R14 Service Connections** adjusted/streamlined, and **4.16B Referral Services** retired
- Two new elements collected at exit: **R18 Counseling** and **R19 Safe and Appropriate Exit**
- Post exit follow-up added: **R20 Aftercare Plans**
- **R2 RHY BCP Status** - New Dependent field 'Runaway Youth' and other changes



Program Specific Changes - SSVF

- **P4 Connection with SOAR** now required for SSVF
- **4.49 Use of Other Crisis Services** retired
- **V6 VAMC Station number** - text field changing to dropdown
 - *Bitfocus reviewed historic information and contacted agencies with any updates needed*



Timeline

	Bitfocus Items	Agency Items
Before 10/2	<ul style="list-style-type: none">✓ Post updated printable forms to the HMIS website✓ Work with programs that use Housing Status for reporting	<ul style="list-style-type: none">✓ Let Bitfocus know if your agency needs assistance related to Housing Status or any other Data Standard items
On 10/2	<ul style="list-style-type: none">✓ Update screens and services in HMIS to reflect Data Standards updates	<ul style="list-style-type: none">☐ If your agency collects custom questions, check your project screens to make sure they are correct
After 10/2	<ul style="list-style-type: none">☐ Reach out to agencies about project setup information for HIC and AHAR	<ul style="list-style-type: none">☐ Provide information for project setup based on Bitfocus questions

CCP Workflow Updates



CCP Workflow: General Information

As part of the 2017 Data Standards, HUD made two major changes that affect Permanent Supportive Housing project:

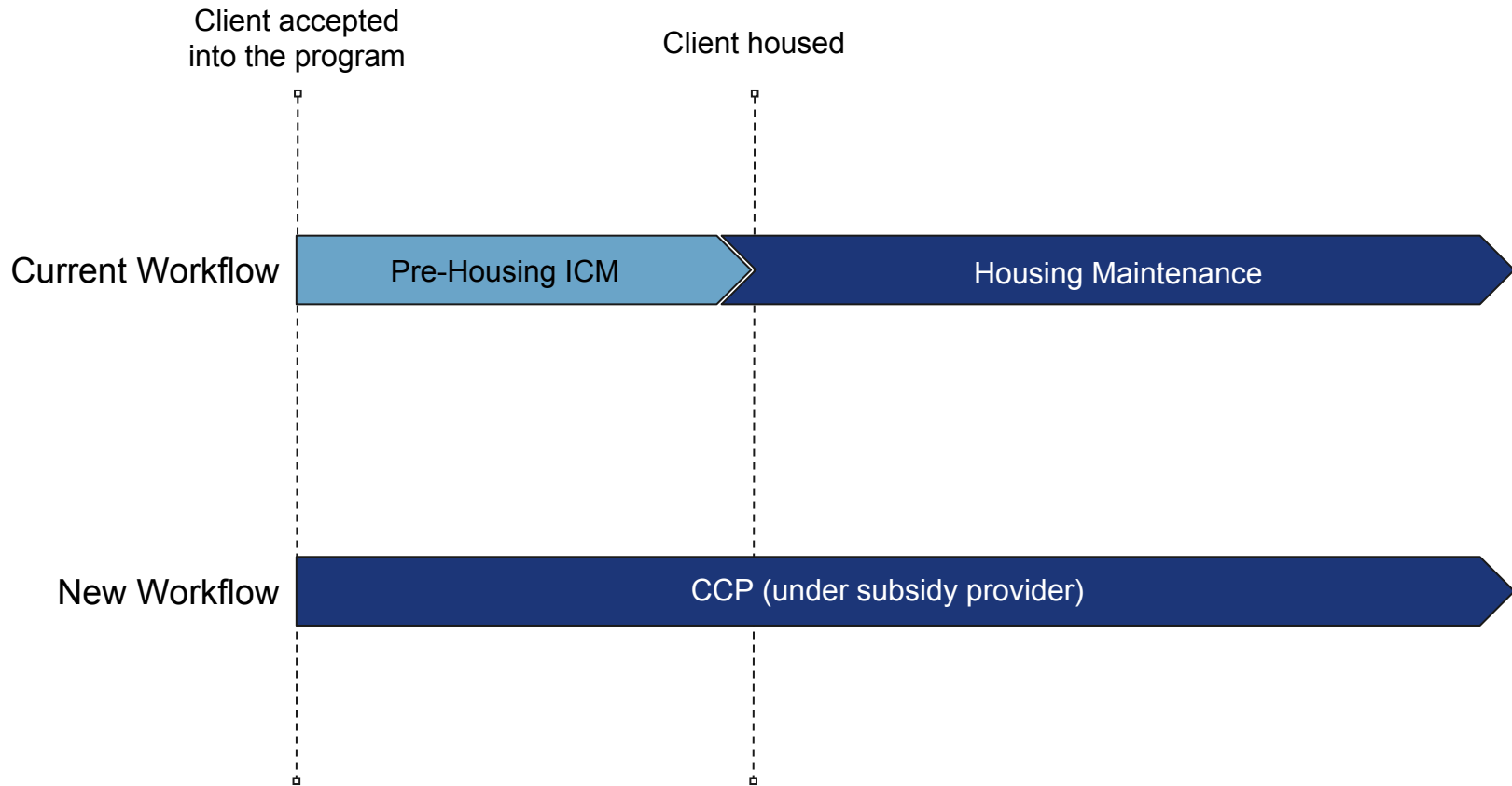
- The **Project Start Date** was changed - clients may be enrolled before they move into housing
- The **Housing Move-In Date** will be used to track when the client is placed in housing

As a result, CCP workflow is changing



Workflow Changes: Highlights




- Pre-Housing and Housing Maintenance will be replaced by one project enrollment into a PSH project
- Enrollment will be under the subsidy provider
- Enroll the client when they are first accepted into the project
- Create a Status Update Assessment and fill out the Housing Move-In Date when the client is housed
- Exit a client when they lose their housing or lose their subsidy
- Historic information will be mapped to the new CCP workflow





Tracking ICM Providers



Fill out questions on the enrollment, status update, annual assessment, and exit screens to indicate which ICM project and Case Manager is providing case management

ICM Information	
Agency Providing Case Management	County of Santa Clara 
ICM Programs (County)	Family Housing 
Case Manager Name	County - CM 1 



Services

- All Housing Search, Behavioral Health and Medical Home Services will be attached to this enrollment
- Housing Services will still be required and will be used to track dedicated units (e.g. Curtner, Onizuka, etc)

[CCP] New Workflow Test Program Housing	Housing
<p data-bbox="614 703 683 721">Curtner</p> <p data-bbox="674 749 925 776">Start Date: 09/06/2017 </p> <p data-bbox="1002 749 1253 776">End Date: 09/06/2017 </p> <p data-bbox="1176 814 1273 833">Add Note</p> <p data-bbox="1335 871 1402 889">Submit</p>	<p data-bbox="1489 899 1508 915">^</p>
<p data-bbox="614 983 683 1002">Donner</p>	<p data-bbox="1489 994 1508 1010">v</p>



Timeline and Next Steps

- ✓ Starting now: Getting existing CCP data ready for new workflow
 - Data Quality review for historic CCP data
 - Shelly has begun contacting agencies with a list of items that need to be reviewed
- ✓ Sept 27 & 29: Trainings on new workflow
 - Will review new workflow in detail
 - Sessions will be scheduled with each agency
 - Location: 3180 Newberry Drive, San Jose, CA 95118 (look out for emails for the exact date, time, and room)
 - All CCP Case Managers should attend
- ✓ Oct 2: Launch date for new workflow
 - Screens updated with ICM questions, services added



Next Steps - October

- CCP mapping of historic data - notice will be sent out once it is completed
- Email will be sent out with instructions for any data updates needed right away (Status Updates to fill out ICM fields, Annual Assessments for APRs)
- Bitfocus will be asking agencies to verify that the list of ICM Case Managers is correct for their agency - if there are any ICM staff changes, please let us know!
- Oct 10 - Q&A session with Shelly
- Later in October - information on how to review/update housing services will be sent out

Standardized Financial Services for Rapid Re-Housing and Homelessness Prevention



Standardized Financial Services - General Information

OSH is standardizing financial services across Rapid Re-Housing and Homelessness Prevention

Goal is to be able to report on financial services consistently System-wide

Financial services will be updated in October

Standardization of non-financials services may follow



Financial Services by Project Type

	RRH (SSVF)	RRH (non-SSVF)	Homelessness Prevention
Rental assistance	x	x	x
Utility fee payment assistance	x	x	x
Utility deposit	x	x	x
Security deposit	x	x	x
Moving costs	x	x	
Transportation services: tokens/vouchers	x	x	x
Transportation services: vehicle repair/maintenance	x	x	x
Child Care	x	x	
General housing stability assistance - emergency supplies	x		
General housing stability assistance - other	x	Other	Other
Emergency housing assistance	x	Motel	Motel



Looker Report Update



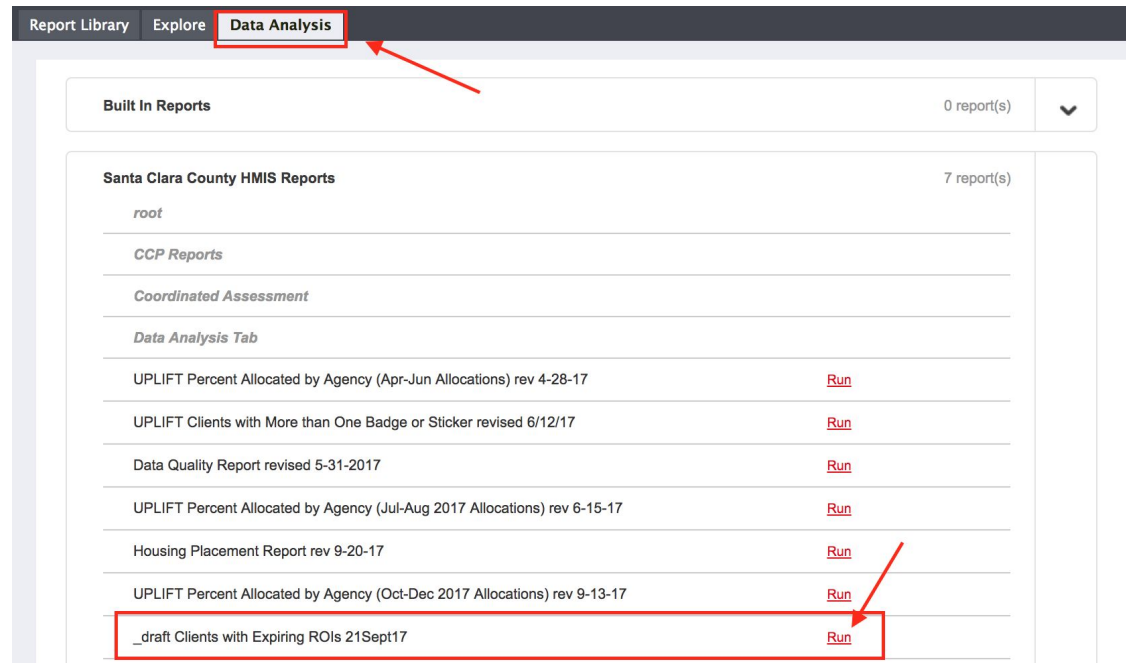
Looker Report - Expiring ROIs

Where to find it:

- Reports Library, Data Analysis tab
- Available to Agency Managers

Important Notes:

- Used to report on clients who are currently enrolled, whose ROIs are expiring within a certain date range



Report Library Explore **Data Analysis**

Built In Reports 0 report(s) ▼

Santa Clara County HMIS Reports 7 report(s)

root

CCP Reports

Coordinated Assessment

Data Analysis Tab

UPLIFT Percent Allocated by Agency (Apr-Jun Allocations) rev 4-28-17	Run
UPLIFT Clients with More than One Badge or Sticker revised 6/12/17	Run
Data Quality Report revised 5-31-2017	Run
UPLIFT Percent Allocated by Agency (Jul-Aug 2017 Allocations) rev 6-15-17	Run
Housing Placement Report rev 9-20-17	Run
UPLIFT Percent Allocated by Agency (Oct-Dec 2017 Allocations) rev 9-13-17	Run
_draft Clients with Expiring ROIs 21Sept17	Run

Expiring ROIs Filters

_draft Clients with Expiring ROIs 21Sept17 Save Look 0 rows · 4.0s · 7m ago Run ⚙️

FILTERS Custom Filter

- Enrollments **Reporting Period Filter** Conditionally Required is in the past 7 days
- Agencies **Agency Name** is equal to System × +
- Enrollments **Active in Project (Yes / No)** is Yes × +
- Programs **Name** is equal to × +
- Release of Information **End Date** is in range 2017-09-01 until (before) 2017-10-01 × +

Update Agency and Program Name

Update ROI expiration date range

VISUALIZATION

DATA **RESULTS** Calculations Row Limit 500 Totals

Clients Unique Identifier	Release of Information End Date	Programs Name	Enrollments Project Start Date
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CDQI: AHAR is Here!



CDQI Focus for the last few months: AHAR

The Annual Homeless Assessment Report (AHAR) is a HUD report to the U.S. Congress that provides nationwide estimates of homelessness, including information about the demographic characteristics of homeless persons, service use patterns, and the capacity to house homeless persons. The report is based primarily on Homeless Management Information Systems (HMIS) data.

This year's AHAR will cover the federal fiscal year of 10/1/2016 - 9/30/2017

Report deadlines:

- First submission 10/31
- Final submission 12/1



Important Note for CCP Projects

With CCP mapping and workflow changes in process, CCP PSH data may be affected during this time.

When doing AHAR review, please focus on:

- Any ES, TH, and non-CCP PSH data
- Client Profile information for CCP PSH clients
- Bitfocus will reach out with any additional CCP-related AHAR requests



AHAR Categories

Data collected for the following categories, plus a summary report

Households and Populations	Program Type		
	Emergency Shelter	Transitional Housing	Permanent Supportive Housing
All Individuals			
All Families			
Veteran Individuals			
Veterans in Families			



AHAR Data

- Basic demographic and enrollment information
 - Age, gender, race, ethnicity, disability status, etc
 - Household size
 - Prior living situation
 - Length of stay
- Capacity and utilization:
 - On average per night during covered time period
 - On Wednesday of the last week in October (October 26, 2016)
 - On Wednesday of the last week in January (January 25, 2017)
 - On Wednesday of the last week in April (April 26, 2017)
 - On Wednesday of the last week in July (July 26, 2017)



How to Help: Data Completeness

Make sure any client enrollments and exits for September 2017 have been entered into HMIS by 10/13

One way to review: Run [GNRL-105] Program Participation Summary (in the Program Based reports folder) to review all households enrolled in September and review for accuracy

How to Help: Run the AHAR Report for Your Agency

Report: [HUDX-202-AD] Program Based Annual Homeless Assessment Report [AHAR]

Where to find it:

- Reports Library
- HUD Reports folder

Important Notes:

- Run the report for each AHAR Category

The screenshot shows a web interface for generating an AHAR report. At the top, there are navigation tabs: "Report Library", "Explore", "Data Analysis", and "Preview". The "Preview" tab is active. Below the tabs, there are five filter sections, each with a dropdown menu and a red instruction:

- AHAR Category:** The dropdown shows "Emergency Shelter - Individuals". Instruction: "Choose Category".
- Veteran Status:** The dropdown shows "All". Instruction: "Choose Veteran = All".
- Report Start Date:** The date field shows "2016/10/01" with a calendar icon. Instruction: "Choose Report Dates: 10/1/2016 -".
- Report End Date:** The date field shows "2017/07/31" with a calendar icon. Instruction: "7/31/2017".
- Report Output Format:** Three radio buttons are present: "Web Page" (selected), "PDF", and "Excel".

An "OK" button is located at the bottom right of the form area.



Items to Review

1. Question 2: Review Utilization

ES-IND Question 2: How many Individuals were using Emergency Shelters ...

	<i># of Persons</i>	<i># of HMIS participating beds</i>
... on average per night during covered time period? a.	<input type="text" value="100.73"/>	
... on Wednesday of the last week in October (Oct 26, 2016) b.	<input type="text" value="113"/>	<input type="text"/>
... on Wednesday of the last week in January (Jan 25, 2017) c.	<input type="text" value="106"/>	<input type="text"/>
... on Wednesday of the last week in April (Apr 26, 2017) d.	<input type="text" value="89"/>	<input type="text"/>
... on Wednesday of the last week in July (Jul 26, 2017) e.	<input type="text" value="104"/>	<input type="text"/>

Items to Review (continued)

2. All Questions: Review “Missing this information” sections

- Categories with higher missing information rates: Age, Race, Disability (for adults), Type of Residence

3. For Individual Categories, Question 3: Review “Age of Children” for accuracy

- Number of children unusually high for ES Individuals

Age of Children: # of Persons

Under 1	a.	<input type="text" value="1"/>
1 to 5	b.	<input type="text" value="0"/>
6 to 12	c.	<input type="text" value="3"/>
13 to 17	d.	<input type="text" value="0"/>

Total: 4

Age of Adults: # of Persons

18 to 24	e.	<input type="text" value="34"/>
25 to 30	f.	<input type="text" value="69"/>
31 to 50	g.	<input type="text" value="250"/>
51 to 61	h.	<input type="text" value="176"/>
62 or older	i.	<input type="text" value="49"/>

Total: 578

Missing this information j.

Persons Reported: 583



October CDQI: If your agency has ES, TH, or PSH programs...

- By 10/13: Make sure all enrollments and exits up to 9/30/17 are up-to-date in HMIS
- By 10/13: Run the **[HUDX-202-AD] Program Based Annual Homeless Assessment Report [AHAR]** for 10/1/2016 - 9/30/2017 for each AHAR Category.
 - Example: if your agency has ES programs, run one report for Emergency - Individuals and one report for Emergency - Families
- In addition, Bitfocus may reach out to your agency with specific data requests or questions about bed inventory/capacity throughout the AHAR report period



October CDQI: If your agency does not have ES, TH, or PSH programs...

For time period of 10/1/2016 - 9/30/2017, review data quality/ completeness for:

- Age
- Gender
- Ethnicity
- Race
- Veteran Status
- Disabling Condition
- Residence Prior to Project Start
- Length of Stay at Prior Place
- Income
- Exit Destination