

# HMIS Agency Data Administrator Training

Friday, 7/28/2023, 1:00 pm

GoTo <https://meet.goto.com/323811013>

## Presenters:

Julie Burdick, David Lake, Becky Sutton

## Attendees:

See Attached Sign-in Sheet

<b>Introductions &amp; Agenda Review</b>	Notes available online for review, <a href="https://dupagehomeless.org/hmis/ada">dupagehomeless.org/hmis/ada</a> .
<b>Updates</b>	New User Interface and rebranding <ul style="list-style-type: none"><li>– Active on training site</li><li>– Scheduled for live site (8/7/2023)</li><li>– New look throughout.</li><li>– Naming updates (i.e. ServicePoint to Community Services, Bowman to WellSky, ClientPoint to Clients, SkanPoint to Scans, etc.)</li><li>– New URL but a redirect will be available for a limited time.</li><li>– New End User Legal Agreement (EULA) upon first login</li></ul>
	Data Standard Changes effective 10/1/2023 <ul style="list-style-type: none"><li>– Highlight changes and update on timeline and next steps. <a href="https://www.hudexchange.info/resource/3824/hmis-data-dictionary/">https://www.hudexchange.info/resource/3824/hmis-data-dictionary/</a></li></ul>
	2023 Site Visits to be completed by 8/31/23. - <a href="https://dupagehmis.youcanbook.me">https://dupagehmis.youcanbook.me</a>
	SAGE Update effective 8/1 - <a href="https://youtu.be/eWF8HFPuqBI">https://youtu.be/eWF8HFPuqBI</a>
<b>Common Questions/Concerns</b>	New User Training: Provider + Type selection – <ul style="list-style-type: none"><li>– Request for Agency Data Admin/staff to assist new users with identifying which projects and EE types they will most often be working with, prior to training.</li><li>– Offer extended to any ADAs who would like to receive a list of their current providers along with funding types that have been selected in the past, for reference.</li></ul>
	End User Survey results and next steps – <ul style="list-style-type: none"><li>– Top concern was not enough time/staff.</li><li>– Others include not able to get all client information and other potential training needs.</li><li>– Suggestions regarding training (agency or HMIS), workflow, or software will be discussed internally to determine what may be actionable.</li></ul>
	Training Timings sheet added to TalentLMS <ul style="list-style-type: none"><li>– Provides a training outline and approximate amount of time each new user training module takes.</li></ul>
<b>Reports/Data Needs</b>	Next quarterly PIT date 7/31/2023. <ul style="list-style-type: none"><li>- Email to go out in the next couple of weeks outlining the details we normally use for creating the PIT reports, and preparation requests for Housing Inv + Funding information updates</li></ul>
	CE Assessment and Event Data Elements data quality to be addressed. <ul style="list-style-type: none"><li>– Prevents use of the LSA data quality tools otherwise.</li></ul>

	<ul style="list-style-type: none"> <li>– Participating agencies to review with staff and system admins will review reporting options.</li> </ul>
<b>Other Training Topics (Julie)</b>	<p>Residential project overlaps</p> <ul style="list-style-type: none"> <li>– Discussion around ensuring clients are only occupying a single bed on any given night, regardless of residential project type (ES, SH, TH, and all permanent housing).</li> <li>– Only 1 RRH project can be active at any given time unless one of the RRH projects is a services only project.</li> <li>– This data impacts accuracy of inventory and occupancy rates used for federal and local reporting.</li> </ul>
	<p>Data collection guidance around self-reported data, progressive engagement, client centered and meeting client where they are at.</p> <ul style="list-style-type: none"> <li>– Seeking training tools/resources from partners on this topic to assist in training end users.</li> <li>– Use existing trainings in TalentLMS.</li> </ul>
	<p>Privacy Management and Subpoenas</p> <ul style="list-style-type: none"> <li>– Consult with agency’s legal representation before taking any action.</li> </ul>
<b>Next Meeting</b>	Friday, November 17, 2023, 1 pm – 2:30 pm, online
	All User Training, Sept-23, date TBA

# Agency Data Administrator Training

July 28, 2023 | 12:44 PM-2:30 PM

Meeting ID: 323-811-013

[View diagnostics](#)



## Attendees

Name	Join and leave times	Location
Julie Burdick (she/her) Julie.Burdick@dupageco.org	12:44 PM – 2:25 PM	West Chicago
Kelly Mannion (she/her) 360 Youth Services kmannion@360youthservices.org	12:56 PM – 2:25 PM	West Chicago
Steve	12:58 PM – 2:25 PM	Dallas
Nereida Enriquez nenriquez@outreachcommin.org	12:58 PM – 2:25 PM	Elmhurst
Lisa Snipes Lisa.Snipes@dupageco.org	12:59 PM – 2:25 PM	West Chicago
Sara Vainowski svainowski@dupagepads.org	12:59 PM – 1:25 PM	Elmhurst
Angelica Arias angelica.arias@dupageco.org	1:00 PM – 2:25 PM	Dallas
Susan Ryerson Espino susan.espino@bridgecommunities.org	1:01 PM – 2:25 PM	Flushing
Rory O'Brochta ro'brochta@cc-doj.org	1:02 PM – 2:17 PM	Chicago (Near South Side)
Joan Fox Joan.fox@Dupageco.org	1:02 PM – 2:25 PM	West Chicago
Tonya Latson tlatson@peoplesrc.org	1:06 PM – 2:25 PM	Morristown
Chris Madsen cmadsen@cc-doj.org	1:08 PM – 2:25 PM	Chicago (Near South Side)
Becky Sutton (she/her)	12:58 PM – 2:25 PM	West Chicago
David Lake (he/him)	12:59 PM – 2:25 PM	West Chicago
Sara Vainowski - DuPagePads	1:23 PM – 2:25 PM	Elmhurst
+16304521468	1:01 PM – 1:40 PM	-



# Community Services 5.14.17 Release Notes

The Community Services v5.14.17 release on 7/20/2023 marks a major design improvement to modernize our software and enhance the user experience. This document will highlight some of the major changes with which existing users should become familiar prior to upgrading to CS v5.14.17 or higher.

Below is a quick summary of the issues addressed in this release:

- Login Screen
- Browser Tab Icon
- End User License Agreement
- Expired Browser Warning
- Home Page
- Navigation Bar
- Legal Notice Bar
- Overall Color Scheme and Navigation Panel Changes
- Updated Icons
- Calendar Date Picker
- Password Validation

More detailed information is listed below.

# Login Screen

WellSky updated the Login Screen to adhere to the WellSky Design Language System, bringing the style to a more modern look and similar to our other solutions.

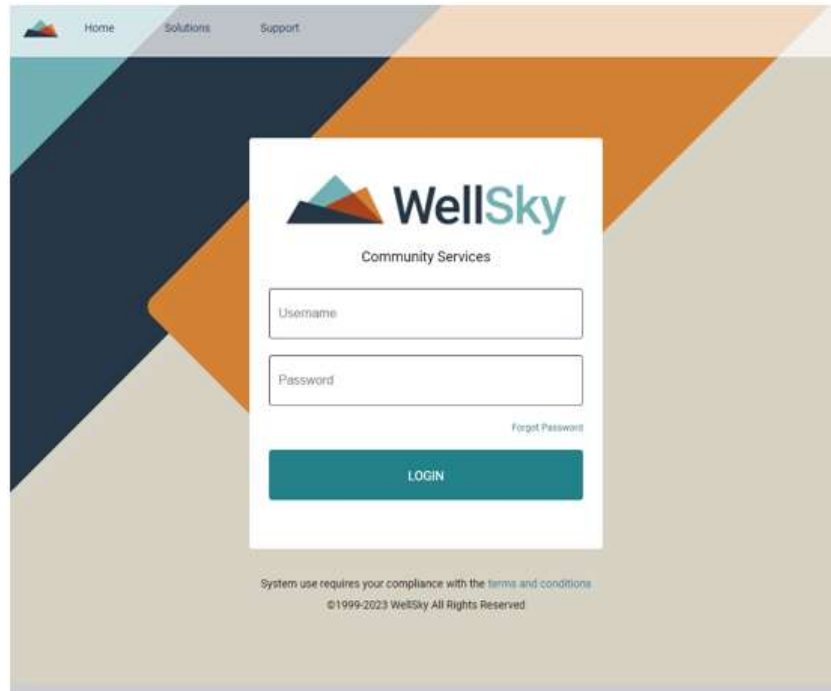


Figure 1

# Browser Tab Icon

WellSky has updated the browser tab icon (e.g., the “favicon”) for Community Services from the ServicePoint compass logo to the WellSky logo.

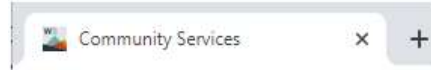


Figure 2

# End User License Agreement

WellSky updated the End User License Agreement (EULA), changing references to “Bowman Systems” and “Bowman” to “WellSky”. This change will require all users to agree to the EULA upon first login to their updated Community Services site.



## Expired Browser Warning

WellSky updated the message displayed to end users when they attempt to access Community Services with an expired or unsupported Browser. Internet Explorer is no longer a supported browser, and we have removed specific version references due to the velocity of updates from various browsers. The warning message is now more generic; "Your browser or browser version isn't supported. Please install a current version of one of the supported browsers below."

# Home Page Dashboard

WellSky has updated the Home Page Dashboard to adhere to the WellSky Design Language System. All Dashboard functions, Navigation Quick Links (Global Search, Print, User Alerts, Add to Favorites, and Help) and modules are within their original locations. These screens reflect updated icons, including the newly dynamic Navigation Bar icons when collapsed; Clients, Calls, Shelters, etc.

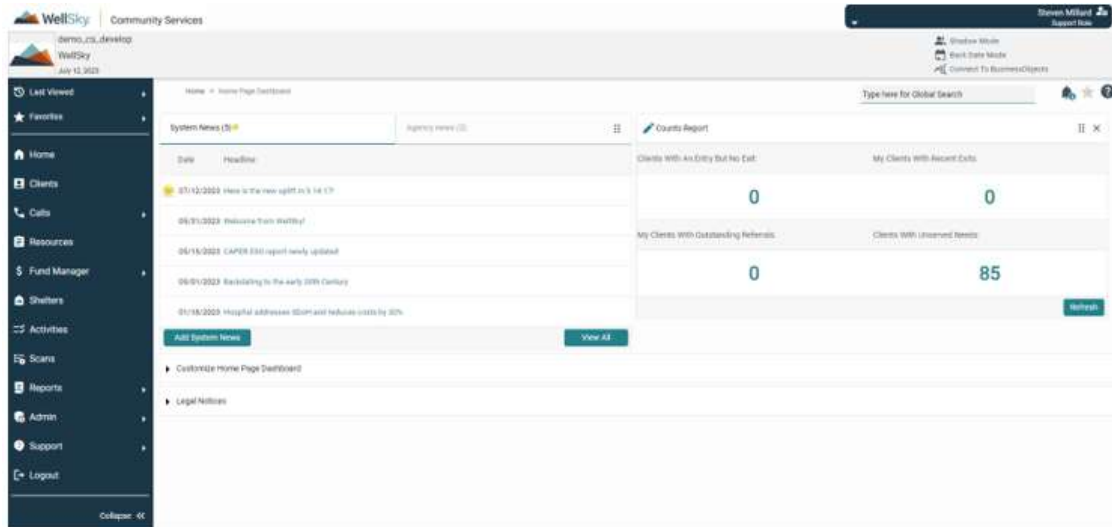


Figure 3

# Navigation Bar

WellSky has updated the Navigation Bar to appear with icons to represent each module. These icons remain when the menu is expanded or collapsed. The names of the modules have been updated, removing the “Point” designations.

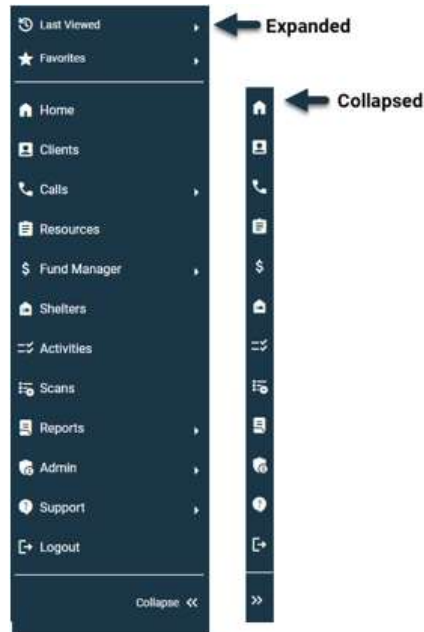


Figure 4

All previous features such as minimized ReportWriter Reports, Last View/Favorite records, and expandable module areas function with improved visibility and highlighting.

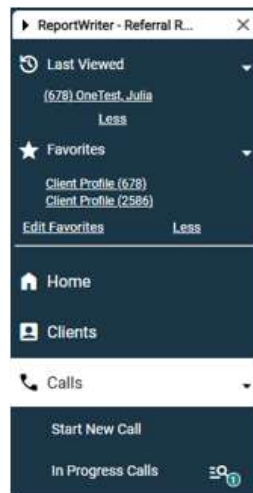
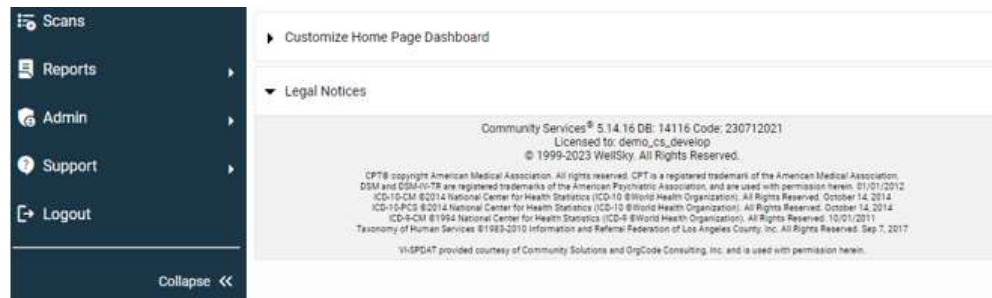


Figure 5

# Legal Notice

WellSky has updated the legal notice from a section available in all modules into a dedicated section on the Home Page.



The screenshot displays the WellSky application interface. On the left is a dark blue sidebar menu with the following items: Scans, Reports, Admin, Support, and Logout. At the bottom of the sidebar is a 'Collapse' button with a left-pointing arrow. The main content area is white and contains a 'Customize Home Page Dashboard' link at the top. Below this is a 'Legal Notices' section, which is expanded to show a grey box containing the following text:

Community Services® 5.14.16 DB: 14116 Code: 230712021  
Licensed to: demo\_cs\_develop  
© 1999-2023 WellSky All Rights Reserved.

CPT® copyright American Medical Association. All rights reserved. CPT is a registered trademark of the American Medical Association.  
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ICD-10-PCS ©2012 National Center for Health Statistics (ICD-10 ©World Health Organization). All Rights Reserved. October 14, 2014  
ICD-9-CM ©1994 National Center for Health Statistics (ICD-9 ©World Health Organization). All Rights Reserved. 10/01/2011  
Taxonomy of Human Services ©1989-2010 Information and Referral Federation of Los Angeles County, Inc. All Rights Reserved. Sep. 7, 2017  
VH-SPDAT provided courtesy of Community Solutions and OrgCode Consulting, Inc. and is used with permission herein.

Figure 6

# Overall Color Scheme And Panel Changes

WellSky has updated color schemes used throughout the systems for the various modules. Specific module colors have been removed and instead replaced with a universal color scheme. Shades of greys, blues, teal and green bring a more cohesive visual style.

Clients Assessment Page example:

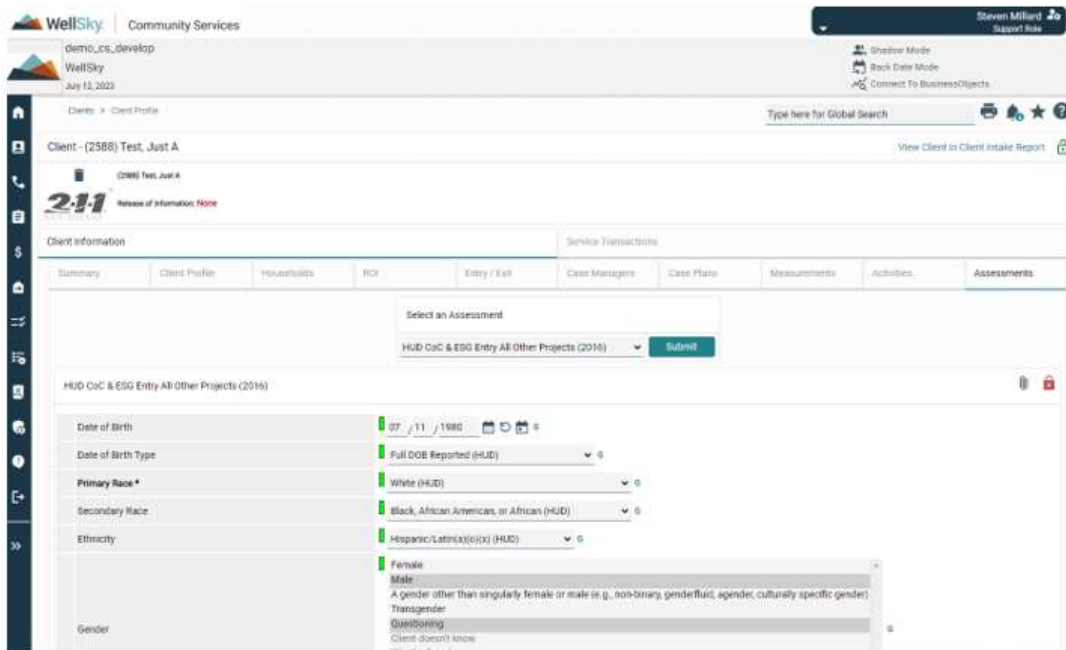


Figure 7

Calls Page example:

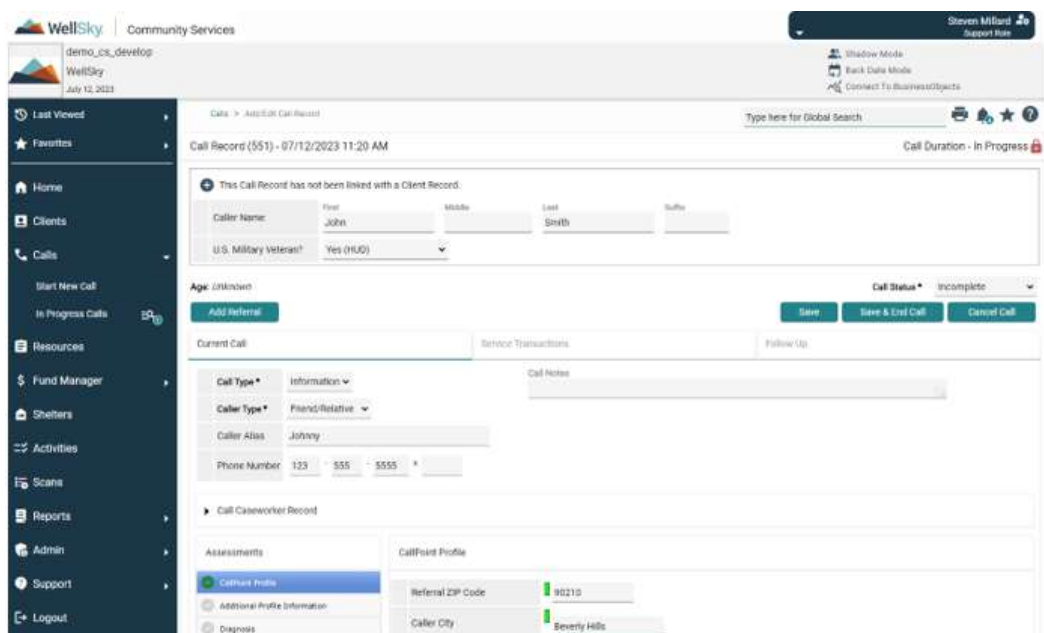


Figure 8

FY2023 CoC APR Report Menu example:

Reports > FY2023 CoC APR Type here for Global Search

**Report Run History**

Report ID	Date Ran (Run-time)	Report Type	Name	User Creating	Running Provider	Running User	Report Status
4223	07/07/2023 01:43:19 PM (0.04 mins)	COCAPR	CoC Example Report	Steven Millard	WellSky	Steven Millard	Completed
4212	06/07/2023 12:13:16 PM (0.04 mins)	COCAPR	Test Report for Steve	Steven Millard	WellSky	Steven Millard	Completed

Refresh Showing 1-2 of 2

**Report Options** Use Previous Parameters

Name: CoC Example Report

Description: Demo for UI Uplift

Provider Type:  Provider  Reporting Group

Provider: WellSky (0) Search My Provider Clear

This provider AND its subordinates  This provider ONLY

Program Date Range: 10 / 01 / 2022 to 09 / 30 / 2023

Entry/Exit Types:
  Basic  Basic Center  Program Entry/Exit  HUD  PATH  Pathway of Hope  Quick Call  RHY  Standard  Transitional Living  Program Entry/Exit  VA  HPRP (Retired)

Build Report Download Clear

Figure 9

# Updated Icons

WellSky has updated the icons in several areas of Community Services. Initial icon updates occurred in the Navigation Panel, Header Panel, and Navigation Trail Panel.

Updated Header Panel and Navigation Trail Panel:

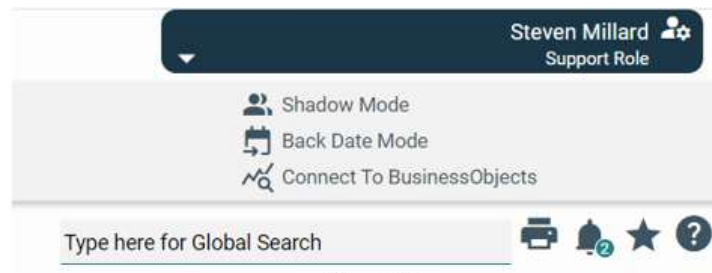


Figure 10

Example of panel with Enter Data As available and Back Date Mode activated:

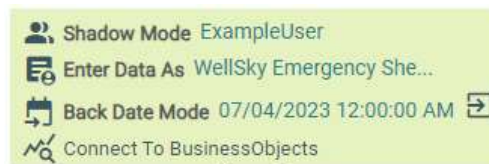


Figure 11

Panels such as the Entry Exit also contain updated icons:

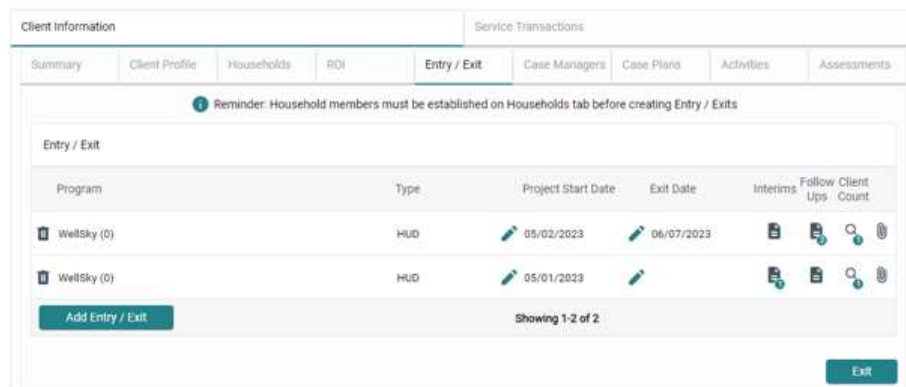


Figure 12

# Calendar Date Picker

WellSky updated the Calendar Date Picker with new icons and an updated Calendar pop-up.

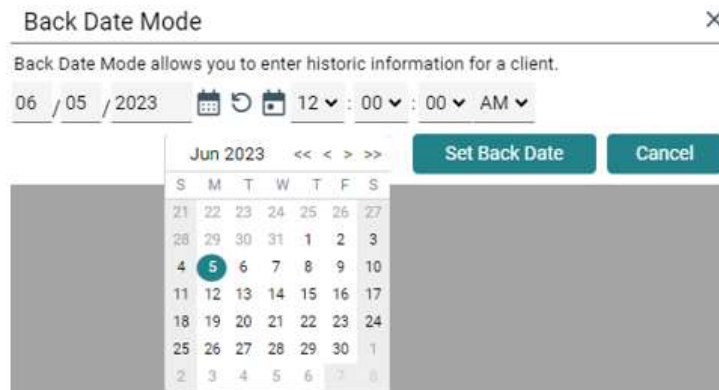


Figure 13



# Password Validation

WellSky has improved the server-side password validation when Users initiate the Change/Forgot Password reset functionality.



# DUPAGE COUNTY

## 2024 Data Standards Summary of Changes

July 28, 2023

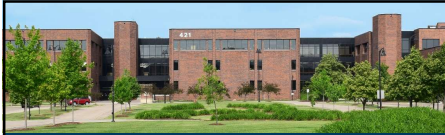
1

### Timeline

Month	Key Events
July 2023	<ul style="list-style-type: none"><li>- Site Visits Begin</li><li>- HMIS Training Site Update</li></ul>
August 2023	<ul style="list-style-type: none"><li>- HMIS Live Site Update</li><li>- Site Visits Completed by 8/31</li></ul>
September 2023	<ul style="list-style-type: none"><li>- All User Training (TBD)</li><li>- Database Preparations</li></ul>
October 2023	<ul style="list-style-type: none"><li>- Data Standards and SOP changes in effect 10/1.</li><li>- Federal Reporting period begins.</li></ul>

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2



## 2024 Data Standards

- Effective 10/1/2023
- Improved wording throughout.
  - Client prefers not to answer instead of Client Refused.
  - Gender neutral language
- Guidance on person centered approach to data collection.



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4

4

## Project Level Data



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5



## 2.02 Project Information

- **Update**
  - Shelter Type now merged with Project Type
  - RRH Project Sub-Type
    - RRH: Services Only
- **Required for**
  - All RRH project types
  - Managed by System Administrators
  - Entered at project creation
- **Action Needed**
  - Assessment of all RRH projects to identify any projects that do not provide nightly rental assistance (supportive services/security deposit only).



6



## 2.07 Bed and Unit Inventory

- **Update**
  - New Dependent field for PH- Rapid Re-Housing
    - RRH: Housing with Services
    - RRH: Housing without Services
- **Required for**
  - All residential projects
  - Managed by System Admins
  - Entered at project creation and reviewed annually or more frequently to reflect changes.
- **Action Needed**
  - Assessment of all RRH projects to identify any projects that do not provide services outside of nightly rental assistance.
  - System Admins to record the RRH sub-type.



7



## 2.08 HMIS Participation Status

- **Update**
  - New Data Element, replacing Operation Start and End Dates
  - Allows for multiple records
- **Required for**
  - All projects
  - Managed by System Admins
  - Collected at project set-up and reviewed annually at minimum.
- **Action Needed**
  - System Admins to enter data into the new fields using the Operation Start Date.



8



## 2.09 CE Participation

- **Update**
  - New field.
  - Identifies any project who conducts screenings, assessments, and/or referrals to another project OR provides some direct service related to diversion, rapid resolution, or navigation.
- **Required for**
  - All projects.
  - Managed by System Admins.
  - Entered at project creation and updated as needed.
- **Action Needed**
  - System Admins to verify projects and complete this data element.



9

# Universal Data Elements



10



## 3.01 Name

- **Update**
  - Client preferred name may be entered unless required by the funder.
  - Use AKA field to track other names the client has gone by.
- **Required for**
  - All clients
  - All projects
  - At the time of record creation and updated as needed.
- **Action Needed**
  - None



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11

11



## 3.02 Social Security Number

- **Update**
  - Last 4 or full number required, depending on funder requirements.
  - Still appropriate to leave SSN filed blank if unknown or client prefers to not answer.
  - SSN Data quality field should reflect the above.
  - Do not delete information previously entered.
- **Required for**
  - All clients
  - All projects
  - At the time of record creation and updated as needed.
- **Action Needed**
  - None



12



## 3.04 Race and Ethnicity

- **Update**
  - Data elements combined
  - New/updated options:
    - Middle Eastern or North African
    - Hispanic/Latina/e/o
    - Text box to add additional options not listed
- **Required for**
  - All clients
  - All projects
  - At the time of record creation and updated as needed.
- **Action Needed**
  - Re-evaluate with client upon next enrollment.



13



## 3.06 Gender

- Update
  - Male to Man (Boy if child)"
  - Gender other than... to Non-Binary
  - Culturally Specific Identity (e.g., Two-Spirit)
  - Different Identity with a text box to add detail
- Required for
  - All clients
  - All projects
  - At the time of record creation and updated as needed.
- Action Needed
  - Re-evaluate with client upon next enrollment.



14



## 3.12 Destination

- Update
  - Headers separating Temporary and Permanent Housing options.
  - New dependency for permanent subsidized options.
- Required for
  - All clients
  - All projects
  - At the time of project exit
- Action Needed
  - None



15





## 3.16 Enrollment CoC

- **Update**
  - Formerly known as Client Location.
  - Only captured at project start.
  - This should be by IL-514 in most cases.
- **Required For**
  - Head of Household
  - At Project Start
  - All programs
- **Action Needed**
  - None



16



## 3.197 Prior Living Situation

- **Update**
  - Headers separating Temporary and Permanent Housing options.
  - New dependency for permanent subsidized options.
- **Required For**
  - Head of Household and Adults
  - At project start
  - All programs
- **Action Needed**
  - None



17

# Program Specific Data



18



## 4.04 Health Insurance

- Update
  - Added Veteran's Health Administration (VHA)
- Required for
  - All clients
  - All HMIS project types
  - At project Start, Update, Annual, and Exit
- Action Needed
  - Re-assess data upon next entry/update/annual/exit assessment.

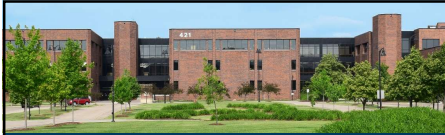


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19

19



## 4.12 Current Living Situation

- Update
  - Added dependency for permanent subsidized options
- Required for
  - Head of Household/Adults
  - Night By Night Emergency Shelter, Street Outreach, Services Only, Coordinated Entry
  - At occurrence (Street outreach must have one at Entry to reflect first contact, and for each contact made afterwards, including the date of engagement).
- Action Needed
  - None



20



## 4.19 and 4.20 Coordinate Entry

- Change - None.
  - Was previously scheduled to be removed and replaced with 4.21.
  - Expect the new data element to be reintroduced in the 2026 Data Standards.
- Field is required for:
  - Head of Household
  - Funder/Program:
    - VA: SSVF Rapid Resolution
    - CoC/ESG funded Coordinated Entry
  - Collected at Occurrence
- Action Needed
  - None



21

# Federal Partner Program Specific Data



22



## C4 Translation Assistance Needed

- **Change**
  - New Data Element
  - Language options determined per HMIS Implementation
  - Will be using current list used for Primary language spoken.
- **Required for:**
  - Head of Household
  - All Projects
  - At project Start
- **Action Needed**
  - Enter Data at Entry for all active clients upon next assessment.
  - System Admin to include and assign in an updated assessment.



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23

23



## C1 Wellbeing

- Change – Retired
- Action Needed
  - System Admin to remove in an updated assessment.



24



## W5 Housing Assessment at Exit

- Update
  - Updated options to include Jail/Prison and Deceased.
- Required for
  - All Clients
  - At project Exit
  - Projects
    - Emergency Shelter – Entry Exit
    - Transitional Housing
    - PH – Permanent Supportive Housing (disability required for entry)
    - Services Only
    - Homeless Prevention
- Action Needed
  - Capture data at exit for exits as of 10/1/23 and on.
  - System Admin to include and assign in updated assessment



25



## R3 Sexual Orientation (PSH)


- Change
  - New for PSH projects
- Required for
  - Head of Households and Adults
  - At project start
  - All RHY funded projects and HUD CoC PSH
- Action Needed
  - Collect data upon next assessment for all clients active 10/1/2023, at the time of project start (entry).
  - System Admins to include and assign in an updated assessment.



## V1 Veteran's Information


- Change
  - Added Space Force
- Required for
  - All Veterans
  - At record creation
  - HUD VASH and SSVF projects
- Action Needed
  - Assess at next update





## V2 Services Provided

- Change
  - Changed subsidy to shallow subsidy
- Required for
  - All clients receiving services
  - At occurrence
  - SSVF RRH and HP projects
- Action Needed
  - None




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31

31



## V3 Financial Assistance

- Change
  - Updated wording
  - Added
    - Landlord Incentive
    - Tenant Incentive
    - End Date of Financial Assistance
- Required for
  - All clients receiving financial assistance
  - At occurrence
  - SSVF RRH and HP projects
- Action Needed
  - None



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32

32



## V4 Percent of AMI

- Change
  - Added 51%-80% and 81% or greater
- Required for
  - Head of Household
  - Project Start, Annual, and Exit
  - All DuPage HMIS projects except Street Outreach
- Action Needed
  - Update data upon next assessment for all clients active 10/1/2023, at the time of project start (entry) and again at exit.



## V5 Last Permanent Address

- Change
  - Retired
- Action Needed
  - System Admins to remove and re-assign an updated the assessment.







## V7 HP Targeting Criteria

- **Change**

- Change dependency C to "Past experience of homelessness..."
- Change dependency D to "Head of Household is not a current leaseholder/renter of unit"
- Change dependency E to "Head of household (HOH) never been a leaseholder/renter of unit"
- Change dependency N to "Single parent/guardian household with minor child(ren)"

- **Required for**

- Head of Household
- Project Start
- SSVF HP projects

- **Action Needed**

- None



# Reporting





## Reporting

- APR, CAPER, and DQ Framework

- Reports Due on or near 10/1- submit early if possible (by 9/30).
- Review early and anticipate issues as of 10/1 and shortly after.

- Business Objects

- WellSky will update their reports prioritizing those with reporting deadlines.
- Local reports – please contact the Help Desk if a report you are using needs to be updated.



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37

37



# Thank you!

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Email: [HMIS@dupageco.org](mailto:HMIS@dupageco.org)

Phone: 630-407-6397

45

# HMIS Training and Collaboration - Talent LMS

## Total Estimated Time:

Total Estimated Time (not including breaks):	6 hr 12 min
--	-------------

## 1. DuPage HMIS User Training: (1) Standard Operating Procedure

Module	Exercise	Approx Time
Introduction	Watch	4 min
Section 1: Roles and Responsibilities	Watch	6 min
Section 1: Roles and Responsibilities Quiz	Do	3 min
Section 2: Privacy Plan	Watch	12 min 30 sec
Section 2: Privacy Plan Quiz	Do	3 min
Section 3: Data Quality Plan	Watch	15 min
Section 3: Data Quality Plan Quiz	Do	3 min
Section 4: Security Plan - Passwords	Watch	3 min
Section 4: Security Plan	Watch	9 min
Section 4: Security Plan Quiz	Do	3 min
Conclusion	Watch	1 min
Conclusion Quiz	Do	1 min
<b>Total Time (not including breaks):</b>		<b>64 min</b>

## 2. DuPage HMIS User Training: (2) Introduction to HMIS

Module	Exercise	Approx Time
HMIS Basics	Watch	10 min 15 sec
TRAINING NILHMIS_Password Reset Procedures	Read	5 min
HMIS Training Site Login	Do	10 min
Standard Workflow	Read	10 min
HMIS Training Site	Watch	4 min 15 sec
Submit HMIS User Agreement	Do	15 min
<b>Total Time (not including breaks):</b>		<b>55 min</b>

### 3. DuPage HMIS User Training: (3) Standard Data Entry Workflow

Module	Exercise	Approx Time
Standard Workflow	Read	10 min
Search and Create a Client Record	Do	10 min
Enter Data As	Watch	5 min 30 sec
Verifying and Managing Privacy	Watch	5 min 40 sec
Client Profile	Watch	8 min 30 sec
Households	Watch	13 min 15 sec
Release of Information (ROI)	Watch	7 min 30 sec
Creating a Program Enrollment	Watch	5 min 40 sec
Assessments	Watch	19 min 40 sec
Living Situation and Chronic Homelessness	Watch	15 min 10 sec
Sub-Assessments	Watch	44 min 30 sec
Case Manager	Watch	5 min 30 sec
Services	Watch	20 min 15 sec
Interim Reviews	Watch	4 min
Program Exits	Watch	7 min 30 sec
Complete the Standard Workflow	Do*	30 min
Training Survey	Do	10 min
<b>Total Time (not including breaks):</b>		<b>3 hr 43 min</b>

### 4. DuPage HMIS User Training: (4) Certification Exam

Module	Exercise	Approx Time
DuPage HMIS End User Certification Exam	Do	30 min
<b>Total Time (not including breaks):</b>		<b>30 min</b>

\* It is recommended that, throughout Module 3 (Standard Data Entry Workflow), users may also enter information into their training client's record after each smaller video section while it is fresh in memory.



# HMIS Dual Enrollments and HIC Duplicate Inventory Training Resource

This resource is prepared by technical assistance providers and intended only to provide guidance. The contents of this document, except when based on statutory or regulatory authority or law, do not have the force and effect of law and are not meant to bind the public in any way. This document is intended only to provide clarity to the public regarding existing requirements under the law or agency policies.

In April of 2021, the U.S. Department of Housing and Urban Development (HUD) released to Homeless Management Information System (HMIS) vendors, HMIS Leads, and Continuum of Care (CoC) leadership the FY 2022 HMIS Data Standards. Included in these standards was an addition in element 4.20 “Coordinated Entry Event” for Emergency Housing Voucher (EHV) referrals to track a CoC’s referrals to EHV through the Coordinated Entry System. This additional EHV tracking in HMIS created urgency for HUD to create the training guidance presented here.

**Intended Audience:** HMIS Leads, HMIS System Administrators, CoC Leadership.

## HMIS Dual Enrollments and HIC Duplicate Inventory Training Resource

To understand the impact dual enrollments and duplicate inventory have on a system-wide analysis, one must first understand the fundamental data analysis tool in the standard analytical toolkit: utilization rates.

For simplicity, “Units” in this context means beds available to be filled by a single-person household or multi-person household. “Household” in this context means a single person wishing to be housed by the project or a group of people wishing to be housed together by the project. For all other terms used in this document (including project types, housing types, tracking methods, and funding sources), please refer to the [HMIS Data Standards](#) for definitions and further explanations.

### Where to start?

When assessing data for data quality, a quick point-in-time extract of the count of inventory units to active households is a useful report to uncover outdated enrollments, erroneous project descriptors, and data entry timeliness issues. Data analysts should go project-by-project and report the number of physical units that are available and the number of households residing in those units at the same point-in-time period. Assessing this frequently (at multiple points in time and regularly) can lead the project to an understanding of their “utilization rate” - the rate at which units are utilized each night. This type of analysis can only be performed on projects that are participating in HMIS.

For purposes of this resource, utilization rate is calculated as follows:

$$(\# \text{ of households residing in units} \div \# \text{ of units}) \times 100 = \text{Utilization Rate}$$

**Expected Utilization Rates** are between 65% and 100%. These rates reflect a community that is housing clients in beds that are needed by the community for housing assistance.

**Low Utilization Rates** (65% or less) could mean one of three things (two of which could be technically correct):

- A project isn't making good use of their funded units to house people experiencing homelessness. If the count of people out-of-doors is greater than 0 on a night where there is low utilization, there should be a concerted effort from the project to house people experiencing homelessness in those vacant units. This rate could be technically correct.
- Those units aren't needed in the community anymore. If the count of people out-of-doors is greater than zero but none of those people are eligible to be housed by the vacant unit, the project (and community and funders) should identify ways to use funding in ways that can house people experiencing homelessness. This rate could be technically correct.
- The utilization rate isn't technically correct. If either the count of physical units or the count of active people in the project are not correct, then the utilization rate will be wrong.

**High Utilization Rates** (more than 100%) are physically impossible and almost always technically incorrect. High utilization rates mean that there are more units being occupied by households than are physically available to be occupied in the project. It doesn't logically make sense and therefore will always be considered incorrect and must be corrected.

## What does this have to do with dual enrollments and duplicative inventory?

A data analyst reviewing system wide data cannot trust the project's utilization rates if larger system wide duplications exist. At the project level, there is likely a system error that prevents a user at a project from entering a household into a unit twice (or otherwise having two enrollments at the same time in the project), but the same software logic usually can't be used at the system level because most CoCs aren't operating a bed-reservation system within HMIS. Therefore, a system-wide assessment of the quality of a CoC's dataset requires an analysis of the households served in the continuum and whether they are living in two different units at the same time where it would be technically incorrect (logically and physically impossible) for them to do so. This is possible only by taking into account project types and inventory availability as described in the Project Descriptor Data Elements (PDDEs) and comparing them to enrollments across a variety of projects in the dataset.

# The Hierarchy of Dual Enrollments and Duplicative Inventory

This hierarchy is meant to visually present an order of implementation for data quality work to eliminate dual enrollments and duplicate inventory where it is most effective to do so. The color coding on the subsequent project type-by-project type overlap tables is as follows, and not every project type is used in every level of the hierarchy:



Emergency Shelter Entry-to-Exit Method
Transitional Housing
Safe Haven
Emergency Shelter Bed Night Method
Permanent Supportive Housing (PSH) Housing Move-In Date to Exit Date
RRH, PH-Housing Only, PH-Housing with Services Housing Move-In Date-to-end date

## Level 1

**“Overlaps Between Residential Projects that Use Entry Date (Project Start Date) and Exit Date (Project Exit Date) to indicate the *household is occupying* that unit on that date.”**

The first level on the hierarchy includes physical units in a building or a series of buildings that are owned or operated by the project and that the client cannot still be considered as residing in once the exit date has been recorded. This includes most or all year-round units in site-based Emergency Shelters (whether facility-based or voucher-based) using an entry/exit method (red), Transitional Housing projects (orange), and Safe Haven projects (green). These are physically impossible dual enrollments that should be found and fixed immediately. These overlaps are considered “easy” to fix with better data entry, exit, and timeliness protocols on the client data, and review and revision of the inventory information in HMIS and the HIC on the inventory data.

**Summary:** Any overlap in Level 1 will point to erroneous data entry or erroneous project set-up in HMIS **100% of the time**<sup>1</sup>.

<sup>1</sup> Beginning in January 2020, HUD allowed flexibility with inventory and enrollment tracking to accommodate responses to the Coronavirus (Covid-19) disaster locally. Please see [this reference document](#) as justification for overlaps caused by tracking isolation/quarantine beds in HMIS.

Inventory/Enrollment #1	Inventory/Enrollment #2	DQ Analysis Issue
Emergency Shelter (1) start-to-end date range (w/in report dates)	Emergency Shelter (2) start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Emergency Shelter start-to-end date range (w/in report dates)	Transitional Housing start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Emergency Shelter start-to-end date range (w/in report dates)	Safe Haven start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Safe Haven (1) start-to-end date range (w/in report dates)	Safe Haven (2) start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Safe Haven start-to-end date range (w/in report dates)	Transitional Housing start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Transitional Housing (1) start-to-end date range (w/in report dates)	Transitional Housing (2) start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible

## Level 2

**“Overlaps Between Residential Projects That Use Entry Date (Project Start Date) and Exit Date (Project Exit Date) to indicate the household is occupying that unit on that date AND Projects That Use Bed Night Date to indicate the household is occupying that unit on that date.”**

The next level on the Hierarchy of Dual Enrollments includes residential shelters that track bed nights for residency status (Night-by-Night or nbn), but leave clients enrolled in their projects even when they aren't staying overnight (blue). These dual enrollments are also physically impossible and should be fixed (either in the entry-exit or bed night data and/or inventory records) but may also contain one or two days of overlap that may be explained by shelter closure or opening times or other situations outside the client's control.

**Summary:** Any overlap at Level 2 should be **fixed nearly 100% of the time**, with information provided as to the reason for any overlaps not resolved by local data quality controls.

Inventory/Enrollment #1	Inventory/Enrollment #2	DQ Analysis Issue
Emergency Shelter start-to-end date range (w/in report dates)	Emergency Shelter Bed Night (w/in report dates)	Any overlap of more than two consecutive days should be fixed; one or two days should be explained.
Emergency Shelter (1) Bed Night (w/in report dates)	Emergency Shelter (2) Bed Night (w/in report dates)	A bed night recorded in two different Emergency Shelter nbn projects on the same date for the same household is physically impossible and should be resolved 100% of the time
Emergency Shelter Bed Night (w/in report dates)	Safe Haven start-to-end date range (w/in report dates)	Any overlap of more than two consecutive days should be fixed; one or two days should be explained.
Emergency Shelter Bed Night (w/in report dates)	Transitional Housing start-to-end date range (w/in report dates)	Any overlap of more than two consecutive days should be fixed; one or two days should be explained.



### Level 3

**“Overlaps Between Residential Projects That Use Entry Date (Project Start Date) and Exit Date (Project Exit Date) OR Bed Night Date to indicate the household is occupying that unit on that date AND Residential Projects That Use Housing Move-In Date and Exit Date (Project Exit Date) to indicate the household is occupying that unit on that date.”**

Next on the hierarchy are projects where “occupancy” in the unit is defined by the Housing Move-In Date, rather than the Project Start Date. In essence, these are households that are using tenant-based vouchers to occupy their own leased units (RRH and other PH projects, in yellow), or they’re households residing in Permanent Supportive Housing (PSH) units (purple) that are owned or operated by the project but in which the client can indefinitely reside. The key to understanding this type of overlap within each of these projects and other residential projects and why it is problematic for utilization is because, in HMIS, once a client has a Housing Move-In Date recorded in an RRH or other PH project, while still having enrollments in other residential projects like ES, TH, or SH, the implication is that the household is in two separate units at the same time, which is, again, physically impossible. Be careful not to find enrollments in PH projects (of any kind) prior to housing move-in date. A client may be enrolled in a PH project prior to Housing Move-In Date, but it should not imply dual enrollment overlaps until such time that they are occupying the different residences at the same time.

**Summary:** Any overlap at Level 3 should be **fixed nearly 100% of the time**, with information provided as to the reason for any overlaps not resolved by local data quality controls.

Inventory/Enrollment #1	Inventory/Enrollment #2	DQ Analysis Issue
Emergency Shelter start-to-end date range (w/in report dates)	PSH Housing Move-In Date-to-end date range (w/in report dates)	Any overlap of more than two days should be fixed; one or two days should be explained.
Safe Haven start-to-end date range (w/in report dates)	PSH Housing Move-In Date-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Transitional Housing start-to-end date range (w/in report dates)	PSH Housing Move-In Date-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Emergency Shelter Bed Night (w/in report dates)	PSH Housing Move-In Date-to-end date range (w/in report dates)	Any overlap of more than two consecutive days should be fixed; one or two days should be explained.
Emergency Shelter start-to-end date range (w/in report dates)	RRH, PH-Housing Only, PH-Housing with Services Housing Move-In Date-to-end date range (w/in report dates)	Any overlap of more than two days should be fixed; one or two days should be explained.
Safe Haven start-to-end date range (w/in report dates)	RRH, PH-Housing Only, PH-Housing with Services Housing Move-In Date-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Transitional Housing start-to-end date range (w/in report dates)	RRH, PH-Housing Only, PH-Housing with Services Housing Move-In Date-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Emergency Shelter Bed Night (w/in report dates)	RRH, PH-Housing Only, PH-Housing with Services Housing Move-In Date-to-end date range (w/in report dates)	Any overlap of more than two consecutive days should be fixed; one or two days should be explained.

## Level 4

**“When the Residential Projects That Use Housing Move-In Date and Exit Date (Project Exit Date) to indicate the household is occupying that unit on that date Are Using Supportive Services To Support Housing Supplied By Other Residential Projects That Use Housing Move-In Date and Exit Date (Project Exit Date) to indicate the household is occupying that unit on that date.”**

This section discusses the overlap between what remains in the world of dual enrollments (having followed the hierarchy up to this point and cleaning data accordingly): funders that have provided flexibilities in the eligible uses of the residential project grants to assist households to move into and maintain units paid for by other residential project grants. This section is the first of the four levels in the hierarchy to introduce the funding source of the residential project because many funding sources can be blended to produce a complete set of housing assistance support for households to end their time homeless.

The ultimate and overarching goal of Level 4 is to align the inventory records to account for the blended funding sources so that seemingly “dual enrollments” and “duplicative inventory” do not appear to exist. That means that combining the services portion of the household and unit tracking into a single residential project where possible is the clearest remedy for a dual enrollment at this stage. Another approach could be to separate housing + services eligible projects and households into one of three distinct projects: those getting housing only, those getting services only, and those getting a combination of both. Practically speaking, this approach is the most straightforward and logical, but is also the most administratively burdensome. HUD strongly encourages CoCs and HMIS Leads to understand the implications of projects being set up for housing + services purposes, the funding sources in use, and the impacts on reporting the households served accurately and completely.

**Summary:** Any overlap and duplicative inventory at Level 4 should be **examined and fixed where possible**, with information provided as to the reason for any overlaps not resolved by local data quality controls or HMIS Project Set-up changes.

Inventory/Enrollment #1	Inventory/Enrollment #2	DQ Analysis Issue
*PSH (1) Housing Move-In Date-to-end date range (w/in report dates)	PSH (2) Housing Move-In Date-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
*PSH (1) Entry date-to-end date range (w/in report dates)	PSH (1) Entry date-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
*RRH (1) Entry date-to-end date range (w/in report dates)	RRH (1) Entry Date-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
RRH, PH-Housing Only, PH-Housing with Services Housing Move-In Date-to-end date range (w/in report dates)	PSH Housing Move-In Date-to-end date range (w/in report dates)	*See supplemental funding source breakdown below
*RRH, PH-Housing Only, PH-Housing with Services (1) Housing Move-In Date-to-end date range (w/in report dates)	RRH, PH-Housing Only, PH-Housing with Services (2) Housing Move-In Date-to-end date range (w/in report dates)	*See supplemental funding source breakdown below

\*Supplemental Funding Source Breakdown

Inventory/Enrollment #1	Inventory/Enrollment #2	DQ Analysis Issue
ESG-funded RRH Housing Move-In Date-to-end date range (w/in report dates)	HUD-funded PIH EHV Housing Move-In Date-to-end date range (w/in report dates)	<p>There is nothing in the guidance preventing the enrollment of one person into two PH voucher-type projects at the same time, but utilizing housing move-in date and exiting the client from the housing supports- funded project with an appropriate destination may be one way to mitigate any residential overlap that could be perceived by dually-enrolled persons in PH projects.</p>
ESG-CV funded RRH Housing Move-In Date-to-end date range (w/in report dates)	HUD-funded PIH EHV Housing Move-In Date-to-end date range (w/in report dates)	
CoC-funded RRH Housing Move-In Date-to-end date range (w/in report dates)	HUD-funded PIH EHV Housing Move-In Date-to-end date range (w/in report dates)	
VA-funded RRH Housing Move-In Date-to-end date range (w/in report dates)	HUD-funded VASH Vouchers Housing Move-In Date-to-end date range (w/in report dates)	
CoC-funded PSH Housing Move-In Date-to-end date range (w/in report dates)	HUD-funded PIH EHV Housing Move-In Date-to-end date range (w/in report dates)	<p>If the client needs to remain enrolled in the housing supports project beyond the housing move-in date in the housing assistance project, knowledge of the reasons and allowability of the overlap (from the various funders) is appropriate to keep in client documentation for future reporting where this situation might be flagged.</p>
CoC-funded PSH Housing Move-In Date-to-end date range (w/in report dates)	HUD-funded PIH HCV Housing Move-In Date-to-end date range (w/in report dates)	
CoC-funded PSH Housing Move-In Date-to-end date range (w/in report dates)	HUD-funded VASH Vouchers Housing Move-In Date-to-end date range (w/in report dates)	<p>Inventory and project set up must be adjusted to ensure that dual enrollments do not occur (since it is assumed these are the same project type). Adjustments could be made to the inventory of the PSH project to decrease by the number of units the HUD-VASH voucher has covered in the PSH, or combining HUD-VASH and CoC units/households into one single project (as long as all households served are eligible for all units) and the inventory counts align to unduplicated numbers of people housed at a point in time could also be an approach to resolve the overlap.</p>