

## AB 977 Training for HCD – 5/11/2023

**STEPHANIE REINAUER:** Hello, welcome to the AB 977 training for HCD recipients. Hopefully you're in the right place. We are gonna get started right away. I'm sure more people will trickle in, but we have a lot to get to today and we will be recording this training.

**STEPHANIE REINAUER:** So, we're here as your AB 977 technical assistance team to help with your implementation of HMIS. I'm Stephanie Reinauer, she/her pronouns. With me is Esau Williams, he/him pronouns. Melissa Stevenson, she/her pronouns. And Ciara Collins, she/her pronouns. We have behind the scenes support also from Hannah Pico and Kayla Thompson. Thanks for helping out.

**STEPHANIE REINAUER:** The agenda today, we're already on welcome and introductions so we're off to a good start. We're gonna go over some AB 977 basics. This might be a quick recap if you were on the office hours last month. But we don't...there's probably some new people on, a refresher is always good. We're gonna talk a little bit about the key partners and what the roles and responsibilities are for each of the different partners involved in this implementation process.

**STEPHANIE REINAUER:** We'll talk about the HMIS project set up. Again, some of this we went over in the initial office hours but we're going to go into more detail and provide some concrete examples. We've been getting a lot of great questions from folks coming in through our help desk. And so, we're able to provide a little bit more targeted training this time. And then we'll talk about the client data entry as well, what the requirements are and give some examples of some of the trickier client data issues.

**STEPHANIE REINAUER:** This session today is really going to be more of a presentation and training, and we have a lot of material to get through. So, we're not probably gonna have very much time for questions and answers at the end. However, we do have our question-and-answer function in Webex open and ready to go for you. So, you can ask questions throughout the presentation. We will do our best to answer as many of them as we can but if we don't get to them you can follow up with us through our email help desk.

**STEPHANIE REINAUER:** And so, if you don't see the question and answer, it doesn't always show up automatically, you might have to open up that function by clicking on these little, 3 little dots and open the Q and A. So, we're not using the chat function for you to ask us questions, but you can use that to submit your questions and we will answer through that. And if we have time at the end of the presentation, we might answer a couple questions aloud as well.

**STEPHANIE REINAUER:** All right, diving right into our content. So, if you don't know by now, AB 977 requires grantees and loanees, we're using the word recipient to be inclusive of certain programs, to enter the data into their local HMIS system, the homeless management information system.

**STEPHANIE REINAUER:** So, this is a local information technology system used to collect client level data including demographics on individuals and households and data on housing and services provided to people experiencing homelessness and people at risk of homelessness.

**STEPHANIE REINAUER:** So, many of you are already familiar with HMIS and might be using it for your HCD programs or other programs and funding that you receive and now we're kind of getting everyone in there for all of these HCD programs impacted by AB 977.

**STEPHANIE REINAUER:** So, it's really about getting those projects set up and getting that client data entered. The due date is July 1, so just around the corner, to set up HMIS projects and enter data for all the active clients. So, we're gonna get into the specifics of what that means.

**STEPHANIE REINAUER:** But the good news is, if clients, you know, you serve them in the past they're not in your program anymore, you don't have to worry about getting those into the data, we're really focusing on who's active July 1, getting your active clients entered into the system.

**STEPHANIE REINAUER:** So, these are the specific programs that were named that need to be entered in HMIS according to AB 977: No Place Like Home program, Multifamily Housing program, including the Supportive Housing and the Homeless Youth Multifamily Housing, Veteran Housing and Homeless Prevention, Housing for a Healthy California program and Homekey. So hopefully, if you're here today, it's because you are operating one of those programs.

**STEPHANIE REINAUER:** There are a few exclusions, and this is a recap as well from the earlier office hours, if projects aren't restricted to people experiencing homelessness or people at risk of homelessness, and we'll talk a little bit more about this in the next sections of the presentation, but HMIS is really a system designed to collect data on people experiencing homelessness and at risk of homelessness. And so if you have a project that is not, that has no units that are dedicated to these populations, then you wouldn't need to use HMIS.

**STEPHANIE REINAUER:** Also, tribal recipients are not required to use HMIS, they are welcome to and we're happy to support those recipients if they want to participate.

**STEPHANIE REINAUER:** And victim service providers are also not allowed to enter client data in HMIS for safety reasons. So, if you are partnering with a victim service provider that's providing the client services, if you have a project that is dedicated to serving victims of domestic violence then you will not be using HMIS. And so, if you're not sure about that, please reach out and we can help you figure it that applies to you or your housing partners as well.

**STEPHANIE REINAUER:** Reporting process and timeline. So, the reporting process is that HMIS leads, and we'll talk a little bit more about this in the next section when we talk about roles and responsibilities and who the key partners are, HMIS leads will be uploading the HMIS data into the Homeless Data Integration System, so HDIS.

**STEPHANIE REINAUER:** So, we'll try to help you not get too confused. The HMIS is where people are going to be entering that client level data and then it's uploaded into a big data warehouse that's a California wide data warehouse. And that's where the reports are going to come from for this compliance. So, grantees don't enter data directly into HDIS. That's done in each...each HMIS system will do that upload and then there'll be reports from HDIS that Cal ICH will monitor compliance through in partnership with HCD.

**STEPHANIE REINAUER:** And so, projects with active clients, again, HMIS projects must be set up and the data for all active clients needs to be entered by July 1, 2023, that's about...what are we at...6, 7 weeks out.

**STEPHANIE REINAUER:** And then projects without active clients, so, this might be if you have a development project that's still in development or rehab and you don't have occupants yet. The

recommendation is to initiate the HMIS project set up at least 90 days in advance of anticipated occupancy so that you're ready to go, right? We don't want to wait until the day before your first client moves in to start that project setup process cause we want you to be able to get that client data entered so you'll be in compliance. So, if you think you'll have clients before July 1 for those projects, you should definitely be setting those projects up now. Ongoing data entry, right?

**STEPHANIE REINAUER:** This isn't just...July 1 isn't the only day we're gonna be looking for compliance. That's just the beginning. And so ongoing, again, it'll be quarterly reports, and you'll want to check with your local CoC and HMIS lead around their reporting and data quality and timeliness expectations so that you make sure that your data is entered in time for that quarterly upload each month or, sorry, each quarter to HDIS. So that you'll get in that system.

**STEPHANIE REINAUER:** All right, we're gonna talk a little bit about the key partners as I mentioned. So, several partners all working together for the same goal, AB 977 compliance. So, we'll briefly go over each role. This will just kind of help folks hopefully see where they are and who they need to be working with. And things will vary a little bit community by community, project by project, how this all plays out, so this is more general.

**STEPHANIE REINAUER:** So, the first thing to think about is the grantees, loanees, and service providers. So, the recipients of the HCD programs, right? Those programs that we listed earlier on, No Place Like Home, Homekey, the Multifamily housing program. So, there's going to be a grantee or loanee that has that contract with HCD and they're really responsible for compliance per the statute, for AB 977.

**STEPHANIE REINAUER:** However, they might not always be the person that's entering the client data. So, in many cases, we know, especially for these development projects, the grant team might be partnering with a housing provider or service provider, partner agency and sometimes there's subgrantees as well. So, the actual task of entering that HMIS data, that client level data, might be delegated to another entity, a service provider, et cetera.

**STEPHANIE REINAUER:** And that would be the person that would need to, the entity that would need to work to get that project set up, make sure they're collecting the right data, get that data entered. But the grantee is ultimately responsible. And it might change over time. Just like any requirement that's passed down to a subgrantee or housing partner, the grantee still is responsible.

**STEPHANIE REINAUER:** And so, if you're wondering, I'm a housing developer, why am I getting emails about client data entry? I don't enter client data. It might be the person working closely with the client is the best person to collect that data, but it really is up to the grantee to make sure that's happening, to pass on that information to whoever would be doing that data entry.

**STEPHANIE REINAUER:** And so, if you are receiving our emails about trainings and things like that, and you kind of have 2 options to make sure it's getting to the right person that's doing that client data entry. One option is that you pass that information on yourself, and make sure it gets to them. Another option is, you let us know through our email desk, please also include so and so on these emails, cause they're the ones that need to make sure they go to those trainings and have information about the office hours and the FAQs and all that, to make sure they get the information they need to go. So, we're working together here, again, all the partners with the same goal of that AB 977 compliance.

**STEPHANIE REINAUER:** We also talk about the CoC and HMIS leads. So, CoC is the Continuum of Care. It can mean a lot of different things, but in this case, we're talking about the regional or local planning body that coordinates housing and service funding for homeless families and individuals. So, it's a HUD geography that's set and within that geography there's a lead agency, the CoC lead.

**STEPHANIE REINAUER:** They're responsible for designating the HMIS lead and they also sometimes through a subcommittee will be setting CoC-wide HMIS policies and this is gonna be important because this will include things like timeliness of data entry and reporting requirements. And we're not gonna get too much into data quality today. We'll have additional trainings on that. But all of that's gonna be coming at the CoC level, and so that's important to be aware of.

**STEPHANIE REINAUER:** And we have the HMIS leads, and this is the entity designated by the CoC to manage HMIS on behalf of the CoC. And so, they're responsible for managing the HMIS system for all of the housing providers and projects within that CoC geography whether through a federal funding requirement, or, in this case, a state funding requirement are going to be using HMIS.

**STEPHANIE REINAUER:** And so, this is so important that you connect with your HMIS lead. They're going to be the ones that contract with the HMIS software, we call this the vendor, and that's...and they're gonna give you the licensing. They'll provide specific training. We're providing general training, but because each community might have a different software and different specific policies you'll need to get that specific training through your HMIS lead.

**STEPHANIE REINAUER:** And they're gonna be the ones you're going to need to work with to set up the projects. We're gonna go through the detail of the project set up requirements, but you really have to do that with your HMIS leads. And they're also, as we mentioned earlier, they're the ones that are going to be uploading the data to quarterly HDIS quarterly. So, important role here.

**STEPHANIE REINAUER:** So, everyone, if you are not in touch with your HMIS leads yet, if you don't know who that person is, I'm even gonna...I'll stop for 1 minute, and write yourself a note, email us, or put in a Q and A right now and say I don't know who my HMIS lead is, I'm not connected to them. We can look that up for you, we need to know where your projects are located.

**STEPHANIE REINAUER:** Generally, county is enough information for us to be able to look up who your HMIS lead and is and connect you. Because if you're not connected, there's no way you're gonna be able to get this work done. I'm pausing right now for everyone to write a note if you're not connected.

**STEPHANIE REINAUER:** Alright. And I'll remind you throughout the presentation at which point you might also need to connect with HMIS leads.

**STEPHANIE REINAUER:** So, the California Department of Housing and Community Development, HCD, you're all here cause you receive HCD funding for one of these grant programs. That's the compliance agency that holds the contracts for these state funded programs, right?

**STEPHANIE REINAUER:** And HCD also maintains a webpage for homeless program data reporting. We'll put the link in the chat, and this is really gonna be your one stop shop for all of the AB 977 information. So, we'll put...there's already materials from the office hours, the instructions guidance, links to future office hours and webinars and training opportunities. Eventually we'll be posting FAQ documents and

training materials there. So really, you know, copy that, again, take a moment, bookmark that link so that you can go back there and keep up to date on all of our support materials.

**STEPHANIE REINAUER:** And last but not least we have Cal ICH and Abt Associates. So Cal ICH is the lead state agency overseeing AB 977 implementation and they've contracted with Abt Associates. We're your technical assistance team: Esau, Melissa, and Ciara and I. We are working directly with the state agencies and the grantees to provide trainings like this, office hours. We have a help desk email, we'll put that link in the chat as well so you can email us questions at any time.

**STEPHANIE REINAUER:** And then we'll be providing 1 on 1 TA as needed. So, if, and we've already started some of this, and folks if you are having trouble figuring out how to connect or get your project set up and we're not able to help you as easily with just an email or something, then we can set up calls with folks as well to really talk through the specifics of your situation.

**STEPHANIE REINAUER:** We also have a whole HMIS TA team. That they are working directly with the HMIS leads to provide them the support and information they need to be able to set up all of the projects in HMIS and do those...make sure they're included in those uploads. And so we're all again working towards that same goal of getting all these programs in HMIS by July 1.

**STEPHANIE REINAUER:** Right, I'm gonna talk about HMIS project set up requirements. Again, there's two, there's really two chunks of HMIS. There is the project and then the client level data. So, each client has demographic information but then they're enrolled in a project and that's how we track that service information and that's how it connects back to the grant and the funding. And so really important that we get the project set up correctly before we are able to add the client data into those projects.

**STEPHANIE REINAUER:** There's a couple of key elements for project set up that I'm going to go over. We're not going to go over every single thing. It's all detailed in the instructions, which are on that website and the information is very familiar to your HMIS leads as well.

**STEPHANIE REINAUER:** So, they're very familiar with all of these project set up requirements, but there's going to be information that you need to provide to your HMIS leads, so that they can set it up correctly. So, they're going to need to know what the project type is, what the funding codes are.

**STEPHANIE REINAUER:** And so, each project can only have one project type based on the project's activities, the type of housing, the population served. And if you are serving different populations or providing different types of services, you may need to set up more than one project for your contract.

**STEPHANIE REINAUER:** I don't think this is going to be super common in these programs but one example might be if you have a contract, an HCD contract, and you're serving some clients that are in a permanent supportive housing project where the clients are...maybe they're chronically homeless and they're getting supportive services and then you also are serving a different population, right? Those would need to be set up as separate projects. So, we'll get into some examples as well. But really project type is really critical.

**STEPHANIE REINAUER:** The funding codes and the grant identifiers, and this is...the slide about this coming up too, but this must be entered in the funding program fields in HMIS. And this is really going to help link back to the grants so that we know who's got their data in the system. And if you don't have those entered in, we won't be able to see that the data is tied back to your program.

**STEPHANIE REINAUER:** And we can have...projects can have more than one funding program. So, you're receiving funding for more than one source or more than one contract you can enter those multiple sources in there. And multiple projects can have the same grant identifiers.

**STEPHANIE REINAUER:** And if there is a case where you have one contract, but it ends up needing to be set up as two different projects because you're serving two different populations. You could still tie those together with that grant identifier.

**STEPHANIE REINAUER:** Quick note on language. We're using the terms program and project. We're trying to be really consistent in how we use those, but lest anyone get confused, the program is the funding source. So, No Place Like Home, Multifamily Housing, the Veterans Program, Homekey, et cetera. So those are your programs. And then a project, specifically an HMIS project, is that distinct unit set up in HMIS that clients are enrolled in.

**STEPHANIE REINAUER:** So, you might also have a housing project that that might have one or more projects, right? So, the project would be maybe the apartments where...that you're funding with the program and then the data would be entered in the HMIS project.

**STEPHANIE REINAUER:** So, funding codes and grant identifiers in a little more detail and again, this is in the HMIS set up instructions for reference. There's a specific funder code for each of these programs, and that needs to be entered in just like this for things to show up correctly in the reports. And then there's also a grant identifier or loan identifier that is going to be made. It's going to include your contract number as well as your county code.

**STEPHANIE REINAUER:** So, we have a list of the county codes that are an appendix to that document as well, the instructions document. And so, you'll be able to look up your county there, get that 3 digit county code, and you should hopefully have your contract number.

**STEPHANIE REINAUER:** And then you'll put those together to make your grant identifier. And that will, again, make it so when we do the reports, we can just make sure that everyone is in HMIS that needs to be in HMIS. So, this is really critical.

**STEPHANIE REINAUER:** And this is also important if you are already using HMIS before the AB 977 rollout started, you were already in HMIS, you still need to go in and add this information or it won't show up in the correct report. So, even if you're already on your way, you got your project set up, you need to work with your HMIS lead to go in and get this set up.

**STEPHANIE REINAUER:** I'm not gonna spend too much time on this, but we mentioned you have to set up the right project type for each project. And again, each project can only have one project type. So, if you're looking at the services that you provide or the population you serve, and it falls into more than one of these project type buckets, you're going to need to set up two separate projects.

**STEPHANIE REINAUER:** And this is not an exclusive list of every project type that might happen. This is the ones, after reviewing the program requirements and eligible activities for each of these HCD programs, these are the ones we think are most likely to be set up. But if you think you have a service that's not fitting into 1 of these boxes, you can work with your HMIS lead and connect with us as well if you have questions and you think it might be a different project type.

**STEPHANIE REINAUER:** Really, the gist of it is, who you're serving, what the eligible population is and what activities are provided. So most of the project types provided in HCD are under the bucket of Permanent Housing.

**STEPHANIE REINAUER:** So, there's Permanent Supportive Housing, which is a dedicated for people experiencing homelessness with disabilities. There's Permanent Housing with Services that is dedicated to people experiencing homelessness but doesn't have those same services and doesn't require the residents have disabilities to enter. And then Permanent Housing - Housing Only doesn't have those attached services and it's dedicated to people experiencing homelessness or at risk. All of those are long term Permanent Housing program types.

**STEPHANIE REINAUER:** We also have limited programs that might fund Transitional Housing. So, this is a temporary lodging. It could go up to 24 months, it could be a lot shorter. And, really, those are places where the residents would have to move out at the end of the program. They couldn't stay there indefinitely, and it's targeted to people experiencing homelessness.

**STEPHANIE REINAUER:** So, these are the main project types kind of mapped to the HCD programs that that we're likely to see them in. So, if you're not sure about which project, your HMIS lead can help you figure that out, and we can help as well.

**STEPHANIE REINAUER:** Continuum projects. Each project you set up, you'll need to either mark as a Continuum Project - yes or no. So, this is defined in the HUD HMIS data standards as a project within the geographic boundaries of the CoC, right, we talked about what that CoC is, served by HMIS whose primary purpose is to meet the specific needs of people who are homeless by providing lodging and/or services. A continuum project is not limited to those programs funded by HUD, and should include all federal and non-federal funded projects functioning with a continuum.

**STEPHANIE REINAUER:** So, it's really not about the funding source. This is really about the essential purpose of the program. If it is a program, or, sorry, if it is a project that is really serving people that are experiencing homelessness, that is a continuum project. And the idea is, really, we're trying to get capture the whole homeless response system in HMIS, right? And that's what the continuum is. All of the projects in that geography that are dedicated to serving people experiencing homelessness. So that's really the critical piece of it.

**STEPHANIE REINAUER:** There might be circumstances where you have a project that has some units that count as continuum and some units that don't, in which case you would need to split those out. And so, any projects that you're setting up that are dedicated to serving individuals experiencing homelessness should be marked as continuum in HMIS. And that will have to do with what federal reports the projects get pulled into or not get pulled into.

**STEPHANIE REINAUER:** Non-continuum projects. So, permanent housing projects serving clients who are at risk of homelessness, those should be designated as non-continuum project when entered in HMIS. So, you know, like we said before, really, the purpose of the continuum projects is what are all the projects that are serving people experiencing homelessness in the geography. And so if it's really designated to that at risk population, you'll be setting that up as a non-continuum project.

**STEPHANIE REINAUER:** And if you have projects that, we know some of these funding sources do, that are not dedicated to people experiencing homelessness nor people at risk of homelessness, these are

not continuum projects and they're not required to be in HMIS. So, if they do enter in HMIS at the provider's discretion, they must be set up as non-continuum projects.

**STEPHANIE REINAUER:** So, this part is a little confusing. And if you're not sure which applies to you, please reach out to us and we can help you figure that out and I have some examples coming up in a few more slides too.

**STEPHANIE REINAUER:** The other thing you're going to need to do at project set up in your...your HMIS folks will be asking for this information when you reach out to them to set up your HMIS project is determine the project inventory.

**STEPHANIE REINAUER:** So, grantees are going to need to enter the number of units and beds available for occupancy on a typical night. So, this is kind of, on average. And for most of these types of projects, it is gonna be a fixed amount of units anyway. The beds, we'll get into, might vary a little bit. And so, we're gonna look for averages typical over time.

**STEPHANIE REINAUER:** But this isn't about how many people you're serving in a year. This is kind of like your point in time capacity. So, a unit, in this case, we think about it as the capacity to serve a single household. So, for Permanent Housing programs, that would typically be maybe an apartment. For a transitional housing program, it could be an apartment or a room, if there's a room that you would serve a whole household in, right?

**STEPHANIE REINAUER:** A bed, we wanna...we're not thinking about a bed as a very literal bed. It's more about the capacity to serve a single person, right? So, we have units to serve households and, in each household, there are people and we have beds that serve people. So, thinking about really when we think about units and beds, it's the capacity of how many households and how many people that the project can serve, again, based on average occupancy. And average household size as well.

**STEPHANIE REINAUER:** So, I put a couple examples here on the slide. So, a 1-bedroom apartment that's occupied by a single person would be 1 unit, 1 bed, right? That's the simplest situation. Or a studio apartment operated by a single person, occupied by single person.

**STEPHANIE REINAUER:** In a 1-bedroom apartment occupied by a couple would be 1 unit and 2 beds, right? It doesn't really matter if it's literally 2 beds, but if it's an apartment that's big enough for 2 people and you have, on average, 2 people living there then that counts as 2 beds. A 2-bedroom apartment occupied by a 2-person family, that would be 1 unit and 2 beds. Where a 2-bedroom apartment occupied by a 4-person family, that's 1 unit and 4 beds, right?

**STEPHANIE REINAUER:** And so, then that's kind of like on a unit by unit, but then you're really gonna be using that information to figure out on average for the whole project. So, if you have a 10-unit project with an average of 20 occupants, that's 10 units, 20 beds. So, I think if you really think about the people in the households, it doesn't have to be too complicated to figure that out.

**STEPHANIE REINAUER:** We also have to think about dedicated inventory, so projects must report the number of the beds that are dedicated to certain population groups, veterans, youth, chronic homelessness and combinations of those as well. So, youth/chronic or chronic veterans.



**STEPHANIE REINAUER:** A dedicated bed means that bed must be filled by the person in that subpopulation or a member of their household unless there's no persons from the subpopulation who qualify for the project located within geographic area. So that's something, hopefully you'll know if you have a project and it's dedicated to one of these populations. So, it shouldn't be too hard to provide that information to HMIS.

**STEPHANIE REINAUER:** The project information, another key point is you're going to need to enter the project start date and the project end date, or, sorry, the operating start date and the operating end date. So, this is the date that the project began providing services or housing and this should match the date that the first client was served in the project.

**STEPHANIE REINAUER:** It could be in the future if the project hasn't started serving clients yet. Or it could be in the past. It could be a long time ago in the past. I know some of these projects have been around for a while and so you're really gonna want to backdate and enter that date as best you can when the project started serving clients. And even if the clients are no longer active in the project.

**STEPHANIE REINAUER:** So, there's a reason we really separated these instructions by the project setup instructions and the client instructions. So, we're thinking at this point, we're thinking about when the project was in operation, then we'll separately talk about what clients need to be entered by July 1, right?

**STEPHANIE REINAUER:** So, even if there's those clients that were entered when that project started aren't there anymore, we still want to have in the system an accurate representation of when the project was operating. If the project is still in operation and it hasn't ended yet, then you're going to leave that operating end date blank. And then that'll be filled in at the time that the project ends.

**STEPHANIE REINAUER:** Projects already entering HMIS data, kind of mentioned this earlier but just to re-emphasize, you still have something to do, right? Hopefully it'll be a quick thing to do. You're hopefully already in contact with your HMIS lead, but you really need to connect with them to make sure that they get the funding codes, the grant IDs entered so that those projects will show up correctly in those reports.

**STEPHANIE REINAUER:** And we've, again, our HMIS team has reached out to the HMIS leads already and given them some of this information, but they will need to connect with you.

**STEPHANIE REINAUER:** And then some projects in some cases, hopefully not too many, that are already entering in HMIS might need to change the project type or create new projects if the project wasn't set up correctly in compliance with the AB 977. So, hopefully this will be limited circumstances and we can work with you and your HMIS lead to figure out what needs to be done in those cases.

**STEPHANIE REINAUER:** But at minimum everyone needs to get those funding codes and grant IDs entered. And then we want to also really call out projects that are in development and we, since we know this applies to some of these grant programs.

**STEPHANIE REINAUER:** So, obviously we're required to enter data on individuals and families served in HMIS, but for projects that are in construction or acquisition projects, rehabilitation projects, if their projects aren't occupied yet, obviously there's no client data to enter. But we really want to get you set

up for success so that when you have your 1st occupancy, you can enter that right away. So, there's no delay in that reporting or that compliance.

**STEPHANIE REINAUER:** And so the recommendation is that the grantees initiate the process of setting up that HMIS project in HMIS 90 days in advance of your anticipated 1st occupancy. Because that might take some time, right? You gotta reach out to your HMIS Lead, they're gonna have some questions about the project. You need get a license. You might need to do a training.

**STEPHANIE REINAUER:** And so, if you think that this applies to you and even if you don't have occupants now, you think you have a project that will likely have occupants by July 1, you should be reaching out to your HMIS leads as well to get moving on that and be prepared.

**STEPHANIE REINAUER:** All right, I think I'm going to hand it over to Esau, for the next set of slides.

**ESAU WILLIAMS:** Thank you, Stephanie. Thank you. So, right now we're going to walk you through some examples, specifically HMIS project set up examples, so you can get a good grasp and feel of what Stephanie was just discussing about project setup. Next slide please.

**ESAU WILLIAMS:** Okay, so, for multiple funding sources, we have an example of Valley View apartments. So, Valley View apartments receives funding from No Place Like Home round 1 and round 2 of funding. This is what they need to do.

**ESAU WILLIAMS:** They need to first work with HMIS leads to enter the funder code for the HMIS project. But then they also need to work with the HMIS leads enter both the grant identifiers for the project, which would consist of the contract number and the county code. So, if you have a multiple funding source example, this is what you would most likely need to do.

**ESAU WILLIAMS:** Next up, we have another example. So, with Sunshine Villa, they receive funding from VHHP as well as the federal funding that requires HMIS participation. They already have a project set up in HMIS with the federal funding source code. This is what Sunshine Villa would need to do.

**ESAU WILLIAMS:** Again, they would also need to work with their HMIS lead to add the funding code in to the HMIS project in addition to the existing funding code. And also work with their HMIS leads enter in the grant identifier for the project, which would consist, again, of the contract number and the county code.

**ESAU WILLIAMS:** So, we've done those 2 examples, you can see the differences, the key being that you still have to work with that main HMIS lead who is kind of the person in charge of entering in that information. Next slide, please.

**ESAU WILLIAMS:** Okay, so Stephanie did talk about continuum or non-continuum. So, we have some examples here as it pertains to if HMIS is required. So, with the continuum where HMIS is required, the project is with the project with units dedicated to people experiencing homelessness. Non-continuum where HMIS is required is a project dedicated to people at risk of homelessness. And a non-continuum where HMIS is not required is a project dedicated to people living with HIV.

**ESAU WILLIAMS:** Just a quick note that if the contract funds some continuum and some non-continuum units, they need to be treated as separate projects. Next slide.

**ESAU WILLIAMS:** Okay. So, for an example of a project already entering HMIS data, we have Happy Housing. So, Happy Housing project receives Homekey funding for Permanent Supportive Housing. They are entering client data in HMIS. So this is what Happy Housing project would need to do.

**ESAU WILLIAMS:** They would need to contact the HMIS lead to add the funder code and the grant ID, which is the contract number and the county code, to their HMIS project. In addition, they would also need to make sure that they require the UDEs and CDEs for active clients are entered by July 1st. So, they still need to make sure that they're entering in the universal data elements and the common data elements, right? Active clients by the due date of July 1st, 2023. Again, the main key and the main person involved again is the HMIS lead. Next slide.

**ESAU WILLIAMS:** Alright, so for determining project inventory, we have an example. We have a few examples. So, for example 1, is with Westside Apartments Permanent Supportive Housing. So, they're funded by VHHP, they serve veterans experiencing homelessness. So, in this example below on the table, there are 10 1-bedroom units, and four 2-bedroom units and 6 studios.

**ESAU WILLIAMS:** So, if you look at this example, you can see the inventory by household type in the 1st column. And as you move to the right, you can see how those participants are split up between adults with children, adults without children, and child only. So, you can see a great example of determining that project inventory and how you would classify those participants in this example. Next slide, please.

**ESAU WILLIAMS:** So, for example 2, we have Eastside Apartments Permanent Housing project, which is funded by MHP to households at risk of homelessness and households with special needs. We have 20 1-bedroom units in the apartment building, but only 10 of the units are dedicated to people at risk of homelessness. Most units are occupied by a single person.

**ESAU WILLIAMS:** So, you can see in this specific example we have our total units, we have the 20 participants, the adults without children listed. So, we have 20 units, but we also categorize them now with the bed category of 10 beds. Next slide, please.

**ESAU WILLIAMS:** Okay. So, for example 3, we have Northside Apartments. Northside Apartments has 20 studio apartments. 5 units are permanent supportive housing units that are dedicated to people experiencing chronic homelessness. 5 of the units are for permanent housing without services for people experiencing homelessness. The remaining units in this example are for low-income households with disabilities.

**ESAU WILLIAMS:** So, you can see the breakdown that we have here of the total amount of units. We have the adults without children. And then compared to project 2 of Northside, which has 5 adults without children. We have total amount of beds. And then down below, we have any other chronic homelessness, not youth, category, which we populate with 5. Next slide, please.

**ESAU WILLIAMS:** Thanks. Okay now we're going to take a look at client requirements. Okay, so I just mentioned UDEs and UDE stands for universal data element requirements. And these vary by project type and household.

**ESAU WILLIAMS:** For example, a name, this is something that is required for all household members of all project types. You have to have a name. As well as if you are dealing with a client that is a veteran.

Veteran status that is required for all adults in all project types. Another example is the housing move-in date. This is a must, this is absolutely required for Head of Household, the HoH, in permanent housing projects.

**ESAU WILLIAMS:** And as a note, grantees creating new projects should enter UDEs for clients who are actively enrolled when the project is created. Of course, you know that the due date is July 1st. But grantees do not need to enter data for clients who exited before the project was set up in HMIS. And we'll get into what active clients mean in this webinar. Next slide, please.

**ESAU WILLIAMS:** Okay, so common data elements also known as CDEs. We are referring this as collected for most programs participating in HMIS. These are data elements that are collected at different stages of the enrollment process.

**ESAU WILLIAMS:** So, when you're working with the client, you may start with your intake, start working with the client, then as you move and progress with the client, these are certain elements that you collect from your client as you move them through.

**ESAU WILLIAMS:** Grantees creating new projects do not need to enter CDEs as of project start for clients who entered the program before the project was created. But you will need definitely enter in the CDEs for all clients that are enrolled on or after July 1st, 2023. Next slide.

**ESAU WILLIAMS:** Okay. So, now we have an excellent table, which kind of compares and you can actually see what we are talking about as far as UDEs and CDEs. So, we have our element name, we have our collected about, and our collection point.

**ESAU WILLIAMS:** So you can see between universal and common, if it's required for all clients, as opposed to just the HoH, which is Head of Household, and adults. Or you can see where your occurrence point would happen as you move through this table. Next slide, please.

**ESAU WILLIAMS:** Okay. So, key dates for client level data. All client dates must be within the project operating dates. So, when we talk about our project start date, this is referring to the date that the client started receiving services from the project. So, that actual date that the client starts that point of receiving services from you all.

**ESAU WILLIAMS:** The housing move-in date, this date is when the client actually moves into the permanent housing. Now this could be the same with the project start date, but it cannot be earlier than the project start date. So, just keep that in mind. A lot of people kind of get confused with that.

**ESAU WILLIAMS:** And the last, the project exit date, the date that the client actually exited from the project. Next slide, please.

**ESAU WILLIAMS:** Okay so now we're going to talk about some client data examples. Okay, so I mentioned active clients. So active client refers to a client that is being enrolled in a project. Essentially, they have a project start date. So, if you have a client and you anticipate working with that client, and they have a project start date and you know that they're going to be enrolled, that would be considered an active client. They have not yet exited from the project and they don't have a project exit date.

**ESAU WILLIAMS:** All clients who are currently being served in a project, regardless of whether they entered the project last week or 10 years ago, it does not matter. They still need to be entered by the due date of July 1st, 2023, or whenever the project is set up. Next slide.

**ESAU WILLIAMS:** Okay, so now we have an example of an active and non-active client. So, on the top is an active client, this will be a client that was housed, for example, in an MHP, and the project is dedicated to serve people experiencing homelessness in 2019 and they are still living in the unit and they are stably housed. So that is an active client.

**ESAU WILLIAMS:** The client's lease start and move date for No Place Like Home project is July 1st, 2023. so those are 2 examples of an active client.

**ESAU WILLIAMS:** Example of a non-active would be a client that was housed in MHP project that was dedicated to people at risk of homelessness in 2021. But in 2022, now, the client left the project to move in with a family member. So, the client has left, the client has exited, that client is not active.

**ESAU WILLIAMS:** Second example, is the client's lease start and move-in date for No Place Like Home project is scheduled for August 1st, 2023, so that client is not active, considered active. Next slide, please.

**ESAU WILLIAMS:** Okay. So, key dates for client-level data.

**STEPHANIE REINAUER:** Esau, do you want me to jump in?

**ESAU WILLIAMS:** Sure.

**STEPHANIE REINAUER:** Yep, it's...sorry, key dates for client level data. So again, this is a little different than the...we have the project dates, and then the client dates. So, the client dates have to be within the project dates.

**STEPHANIE REINAUER:** After completing the eligibility paperwork and receiving a referral to the project, the client meets with the case manager on May 11 to discuss service needs and prepare for move-in and then they move in on June 1. And they're still in the unit on July 1. So, in this example, the project start date for that client would be that May 11th, they started receiving services. And then the housing move-in date would be June 1. And we would leave that exit date blank until the client exits the project.

**STEPHANIE REINAUER:** Another example would be the client moves in in April, and the case manager meets with the client monthly after move in to coordinate services. And the client is still housed on July 1. In this case, the project start date and the housing move-in date could both be April 1.

**STEPHANIE REINAUER:** So, either of those, depending on your project, either of those examples might be your kind of typical case. Either the move-in date is the same as the project start date or there might be a project start date before the move-in date. The move-in date can never be before the start date, right? And then in any case, whoever's still active on July 1, you would leave the project exit date blank until the client exits the project.

**STEPHANIE REINAUER:** And the key dates for this example, this 3rd example, if the client has been living in the project since July 2020, you could also put the start date and the move in date both as July 2020

and then you would leave it blank. So, even if they've been living there for a long time, you're putting that back date information to be as accurate as you can. And then they would still be active in the project if they haven't moved out yet.

**STEPHANIE REINAUER:** And then our final example, if the client moved into the unit in January 2021, and left the unit in April 2023, they could have that project start date and project move-in date on January 2021, exit date on April 30th, 2023. However, since this client is not active, they're no longer on the program on July 1, they don't need to be in HMIS per AB 977.

**STEPHANIE REINAUER:** Now, you might have another funding source that requires them to be in HMIS, or you might want to add them in just for your own project records. But AB 977 it is only going to affect the clients that are active still on July 1.

**STEPHANIE REINAUER:** Alright, we got through most of our content, so I'm briefly going to mention our opportunity for support and next steps and then we can see if we have any remaining questions.

**STEPHANIE REINAUER:** So, again, this is a screenshot of that webpage that HCD set up and that's gonna be really super useful place for you to go. I would recommend bookmarking it, as I have, so you can always go back.

**STEPHANIE REINAUER:** And, from there, you can get the link to our Help Desk email, and you can get the instructions, and information on upcoming office hours, and opportunities. You can see materials from previous office hours as well, and we will be posting FAQ documents. I think we had a question in the chat come in that this will be where you go to get the materials from this meeting as well. So, check back often for more information.

**STEPHANIE REINAUER:** We do have 2 office hours coming up next month. So, it is really the...next month is that final push before that July 1 due date so we have office hours on June 8th and June 21st. These are open for all AB 977 grantees. So, not just the HCD programs, but some of the other state agency programs as well. But this will be just come in and ask your questions.

**STEPHANIE REINAUER:** So, you could email us to ask questions, you can come to the office hours, lots of ways to get help and support. And hopefully you're reaching out to your HMIS, can't say this enough. Reach out to your HMIS leads if you haven't already.

**STEPHANIE REINAUER:** And so, Melissa and Ciara, do I have any questions that I should answer aloud or anything we want to circle back to? Clarification?

**CIARA COLLINS:** I mean, there's just one question that asks if it's the same page for the office hours. Yes, the page that Stephanie just showed a screenshot of and the website that we have in the chat as well as in one of the Q and A answers, that HCD webpage is...yes, that Stephanie's showing right now, those office hour registration links that she just talked about.

**CIARA COLLINS:** I did think, I'm just, I'm asking this on the fly. For the 1 question we had about project beginning. I didn't know if this was clear in the following slides for everyone. Just like the differences in start dates for, a rapid rehousing project versus, I don't know if there's anyone...I just want people to be aware that the project start date for clients can be ahead of their move-in date if they're receiving services.

**STEPHANIE REINAUER:** Yeah, thanks, Ciara. We didn't focus on this because these programs, these grant programs don't fund rapid rehousing, but some of you might be working for providers that do have rapid rehousing projects as well. The closest example I think we have here would be...nope that's not it...would be if a client started working with a case manager prior to move in.

**STEPHANIE REINAUER:** So, this is a lot more common in projects like rapid rehousing where you might be doing a housing search that could take weeks or months, right? And all of that is time that you're enrolled, the clients are enrolled in the program, and should have a project start date. That might be a good amount of time before they're housing move-in date.

**STEPHANIE REINAUER:** We, you know, based on our understanding of these programs, we think many of them will enroll at the same time as they move in. But if it is the case that you want to capture that services provided time prior to move in, then you could enter that project start date for...it would be whenever you start providing services to the client, whether those are case management services or housing search or anything like that. Does that get at the question Ciara?

**CIARA COLLINS:** Yeah, I think that's perfect. I just didn't want anyone to be confused if they had heard something or read something different somewhere else.

**STEPHANIE REINAUER:** Yeah, we didn't get into the weeds of other types of HMIS projects like prevention, because it's not very applicable to these projects. But if you have questions about those, please reach out and we can help you figure that out.

**STEPHANIE REINAUER:** Any other questions we should address aloud?

**CIARA COLLINS:** We have 1 question that asks about whether there are seminars available for HMIS and the coordinated entry system practice. We're not in...and then a follow up of: is this a question for our HMIS lead?

**CIARA COLLINS:** I think we're not exactly clear, but it sounds like that might be a question for your HMIS lead for, as Stephanie mentioned at the beginning, your very specific local training system, getting set up, et cetera. The HMIS lead will be able to help you with that the best.

**CIARA COLLINS:** We are in the process of having like a recorded training for HMIS basics. That won't get into the nitty gritty of how to use your, whatever specific system is in your community. But more information will be coming on that. And I would, I believe would also be posted to that HCD website. So, like Stephanie said, continuing to look back there for materials and stuff will be your 1 stop shop. And also, as Stephanie said, we will be posting FAQs there, which we have said over and over in the FAQs.

**CIARA COLLINS:** And today, just reiterating if you do not know who your HMIS lead please do email the AB 977 which is also on the chat. That can also be a 1 stop shop if you're not sure what to do or who to go to. We can help.

**CIARA COLLINS:** That's it, though.

**STEPHANIE REINAUER:** Great. Well we'll stay on the line for a few more minutes if people have a question that pops into their head.

**STEPHANIE REINAUER:** Thank you all for joining this training. We'll let folks know once it's online. And we didn't have a ton of people here so if you have colleagues at your projects that you need to see this training that are gonna be doing the data entry, then you'll be able to get the training link from that website.