BHBH Implementation of AB 977 and Homeless Management Information System (HMIS) Webinar

April 3, 2024

9:30 am – 11:00 am

Housekeeping

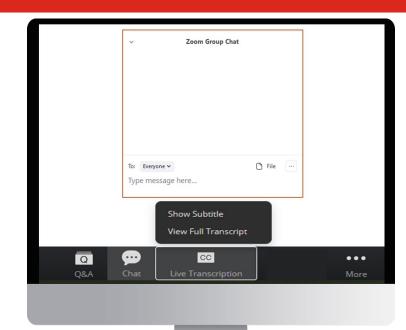|		
This event is being recorded: Audio is now broadcasting	01	
Audio is provided through your computer speakers or headphones: Your line is automatically muted.	02	
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Live Captioning is Available: Click the CC Live Transcription button to show and hide captions during today's event.	04	
Chat: Click the Chat icon to open the Chat panel.	05	
Need help or have questions for our presenters? Please type in the Q&A box!	06	

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DHCS Welcome

Alyssa Jean-Gilles
Community Services Division
Behavioral Health Bridge Housing Program
Department of Health Care Services

Your AB 977 Technical Assistance (TA) Team

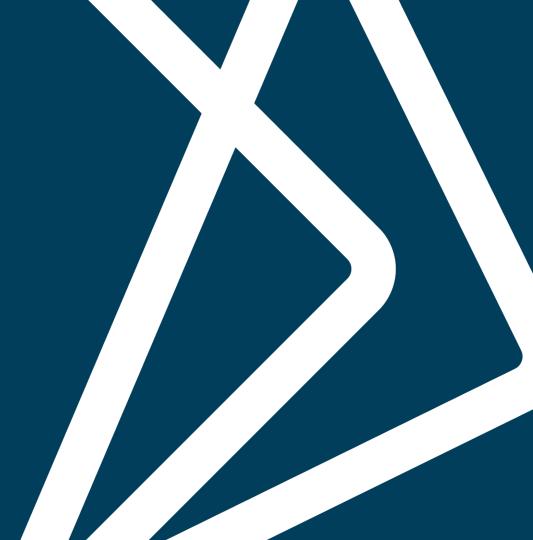- Ciara Collins (she/her)

- Mary Schwartz (she/her)

Agenda

1. AB 977 and HMIS Overview

2. HMIS Project Setup Requirements

3. Project Data

4. Client Data

5. Support & Next Steps

AB 977 and HMIS Overview

Assembly Bill 977 (AB 977)

- AB 977 requires grantees of state homelessness programs to enter data into their local Homeless Management Information System (HMIS).

- HMIS is a local information technology system used to collect project and client-level data including demographics and data on housing and services provided to people experiencing homelessness and people at risk of homelessness.

- BHBH grantees have until May 31, 2024, to assist HMIS Leads to set up HMIS projects and to then enter data into those projects for all active clients (as of May 31, 2024).

AB 977 Exclusions

- Projects that are not dedicated or restricted to people experiencing homelessness or people at-risk of homelessness.

- Tribal grantees: HMIS participation is not required **under AB 977,** but TA is available.

- Victim Service Providers (VSPs) — <u>organizations</u> with a primary mission of providing services to victims of domestic violence, dating violence, sexual assault, or stalking — are prohibited from entering client data in HMIS and thus not required to comply with AB 977.

- Also prohibited are projects that receive funding the Family Violence Prevention and Services Act (FVPSA), Office for Victims of Crime (OVC), or Office on Violence Against Women (OVW), or receive Specialized Housing and Services for Victims of Human Trafficking funds to operate the project.

PLEASE LET US KNOW IF ONE OF THESE SITUATIONS APPLIES OR IF YOU AREN'T SURE.

Key Terms

Homeless Management Information System (HMIS): A local information technology system used to collect project and client–level data and data on the provision of housing and services to homeless individuals and families and persons at risk of homelessness.

Homeless Data Integration System (HDIS): A statewide data warehouse of data from the 44 local homelessness response systems in California.

Continuum of Care (CoC): A regional or local planning body that coordinates housing and services funding for homeless families and individuals and is responsible to carry out the responsibilities required under the CoC Program Interim Rule, including selecting an HMIS software solution (vendor) and an HMIS Lead.

HMIS Lead/System Administrator: The entity designated by the CoC, in accordance with the CoC Program Interim Rule, to manage the CoC's HMIS on the CoC's behalf.

Program: A funding source (e.g., BHBH).

HMIS Project: A distinct unit of an organization as set up in the HMIS in which clients are enrolled to track receipt of services or housing.

Roles: HMIS Leads

HMIS Lead within the CoC: The entity designated by the CoC to manage the CoC's HMIS on the CoC's behalf.

- Contracts with HMIS software vendor
- Provides licenses and training to HMIS users
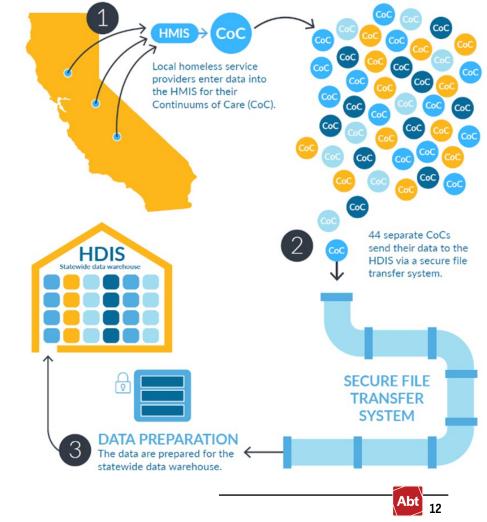- Sets up HMIS projects
- Uploads HMIS data to HDIS quarterly

California Continuums of Care (CoCs)

Roles: BHBH Grantees & Partners

➢ As the recipient of state funds, BHBH grantees are ultimately responsible for ensuring that HMIS data is collected and entered *by whoever is designated as the data entry organization*.

➢ Each grantee should work with their housing partner/service provider if applicable to plan for how data will be collected and who will be responsible for data entry.

➢ In most cases, the entity providing direct services is best positioned to collect and enter client–level data.

Reporting Process

1. **BHBH grantees** ensure projects are set up and data is collected and entered in HMIS (by whoever is designated as the data entry organization).

2. **HMIS Leads/Admins at the CoC** upload HMIS data into HDIS on a quarterly basis.

3. **Cal ICH and DHCS** will monitor compliance through reports from HDIS.

1 Local homeless service providers enter data into the HMIS for their Continuums of Care (CoC).

2 44 separate CoCs send their data to the HDIS via a secure file transfer system.

SECURE FILE TRANSFER SYSTEM

HDIS
Statewide data warehouse

3 DATA PREPARATION
The data are prepared for the statewide data warehouse.

Checklist for Program Leads

❑ Meet with your subgrantees, service providers, and any other entity involved with data entry to make a plan to collect required client data

❑ Determine who will be collecting the data from participants and who will be entering the data into HMIS

❑ Let AHP and Abt know who the main contact points will be for HMIS

❑ Determine what type of services will be provide

❑ Reach out to your HMIS Lead/Admin to initiate project setup, creating user accounts, signing user agreements and getting training

❑Oversee ongoing data quality

It is critical that you connect with your HMIS lead as soon as possible if you haven't already!

Let's Review

HMIS Project Setup Requirements

Key Elements for HMIS Project Setup

What is an HMIS Project? A distinct unit of an organization as set up in the HMIS in which clients are enrolled to track receipt of services and/or housing.

Project Type: Each HMIS project has one project type based on the project's activities, type of housing or shelter, and the population served.

- Recipients providing different types of housing and/or services or serving different populations may need to set up more than one project.

Funding Codes and **Grant Identifiers (Grant IDs):** must be entered into the Funding Program fields in HMIS.

- Projects can have multiple funders and multiple grant IDs in HMIS.

- More than one project can share the same grant ID.

Projects Already Entering HMIS Data

All projects:

- Add funding codes

- Add grant identifiers

Some projects:

- May need to change project type or create new projects

- May need to transfer or re-enter client data

Work with your HMIS Lead to determine the best method of updating project or client data.

Privacy Notices and HIPAA and 42 CFR

BHBH Grantee and CoC should review the CoC's HMIS Privacy Notice and County BHA requirements to ensure that appropriate and allowable uses and disclosures are listed and to modify forms/notices as needed to comply with HIPAA and 42CFR. Technical Assistance may be accessed as needed to help with discussions locally.

Two Parts of HMIS Data Collection

Project Data

Information about the project including:

- the type of services provided
- the populations served
- the funding sources associated with the project
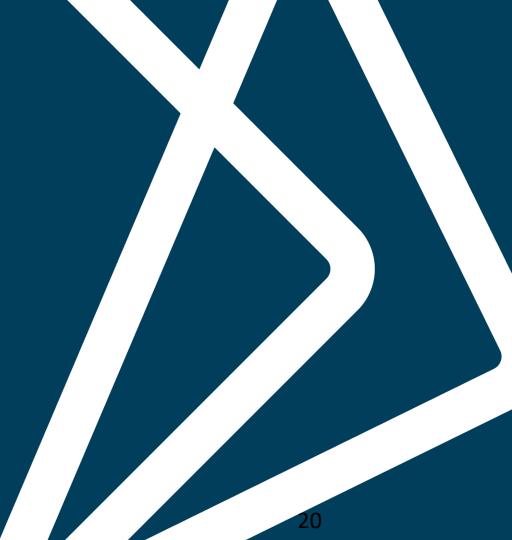- the service provider

Client Data

Information about the people receiving services, including:

- demographic information on the student and other household members
- information about project enrollment and exit

Project Data

HMIS Project Setup

Work with your HMIS leads to set up HMIS projects OR update existing HMIS projects.

- Organization information

- Project Type

- Inventory

- Project Operating Start and End Dates

- Funding Codes and Grant Identifiers

Organization Information

Organization Name: The organization name in HMIS should be the name of the organization that will be entering the client data into HMIS. Enter the name of the college providing housing assistance. Subcontractors or partner organizations which are providing direct service must create separate projects in HMIS.

Victim Service Provider: Enter "No" if not a Victim Service Provider. If the organization is a Victim Service Provider, they are prohibited from entering client-level data into HMIS and are not required to comply with AB 977.

Project Type

Project Type: Each HMIS project has one project type based on the project's activities, type of housing, and the population served.

- Recipients providing different types of services or serving different populations may need to set up more than one project.

Project Types for BHBH

Emergency Shelter (ES): Temporary or interim shelter, including vouchers or payments for hotel/motels, recovery housing, or rental assistance without tenancy rights, for people experiencing homelessness

Rapid Rehousing (RRH): short- to medium-term rental assistance + services for people experiencing homelessness.

Supportive Services Only (SSO): Housing project specific **or** stand-alone supportive services (other than Street Outreach or Coordinated Entry) to address the special needs of participants including BHBH participants in auxiliary funding for assisted living settings.

Dedicated Bed Inventory

- Projects must report the number of these beds that are dedicated to any of the indicated population groups: Veterans, Youth (under 25 years old), or Chronically Homeless (or any combination thereof).

- A dedicated bed is a bed that **must** be filled by a person in the subpopulation category (or **a member of their household**) unless there are no persons from the subpopulation who qualify for the project located within the geographic area. Dedicated beds apply to the **entire household.**

- For example, a Rapid Rehousing Housing project serves chronically homeless individuals with children. There are 10 apartments, and the average household size is 2. In HMIS, inventory would be entered as:

  o Total units = 10

  o Total beds = 20

  o Beds dedicated to chronically homeless = 20

Project Operating Start and End Dates

Operating start date

The date that the project began providing services and/or housing. This should match the date the first client was served in the project and can be in the future if the project has not yet started serving clients.

Enter the date the project started serving clients even if those clients are no longer active in the project.

Operating end date

Leave blank until project ceases providing services and/or housing to clients.

Funding Codes and Grant Identifiers

1. Funding Source = select "Local or Other Funding Source"

2. Other Funder Code = CA–DHCS–BHBH

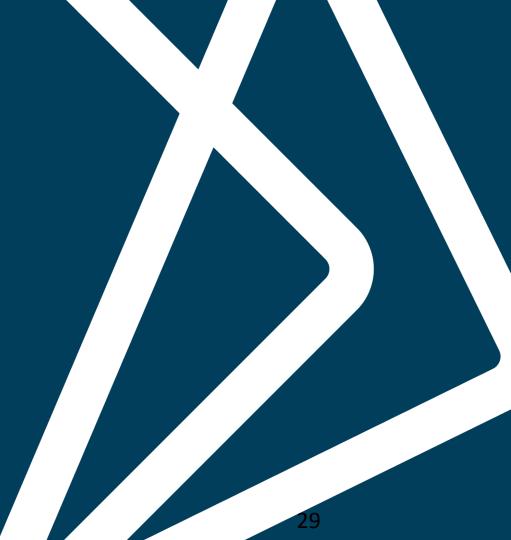3. Grant Identifier ("Grant ID") = BHBHXX ← whatever your Grant ID is

Entering Funding Codes and Grant IDs

FUNDING SOURCE

Name	2nd funding source
Status	Active
Funding Source **2.06.1**	Local or Other Funding Source
Funding Source Non Federal **2.06.1A**	**CA-DHCS-BHBH**
Funding Start Date	09/20/2021
Funding End Date	_/_/_
Direct Expenses	
Eligibility	
Tom Cat funding	

SAVE CHANGES   CANCEL

GRANT ACTIVITY   ADD NEW GRANT ⊕

2.06.2 Grant Identifier	**2.06.3** Start Date	**2.06.4** End Date	Adjustment	Total Grant Amount	Created Date
BHBH00	09/20/2021	(not set)	0.00	0.00	09/20/2021

2.06.1: Select "Local or Other Funding Source"

2.06.1A: Enter **or** select BHBH funding code. **Do not add extra spaces, characters, or letters!**

2.06.2: Enter YOUR Grant ID (the ID shown is just an example)

Note: You can add multiple funder codes to a single project if project receives funding from more than one funder.

Client Data

Universal and Common Data Elements

	Number	Element Name(s)	Collected About	Collection Point(s)
Universal	3.01-3.06	Name, SSN, DOB, Race and Ethnicity, Gender	All Clients	Record Creation
	3.07	Veteran Status	All Adults	Record Creation
	3.08	Disabling Condition	All Clients	Project Start
	3.10	Project Start Date	All Clients	Project Start
	3.11	Project Exit Date	All Clients	Project Exit
	3.12	Destination	All Clients	Project Exit
	3.15	Relationship to Head of Household (HoH)	All Clients	Project Start
	3.16	Enrollment CoC	HOH	Project Start, Update
	3.20	Housing Move-in Date (PH project only)	HOH	Occurrence Point
	3.917	Prior Living Situation	HOH and Adults	Project Start
Common	4.02	Income and Sources	HOH and Adults	Project Start, Update, Annual Assessment, and Project Exit
	4.03	Non-Cash Benefits	HOH and Adults	
	4.04	Health Insurance	All Clients	
	4.05	Physical Disability	All Clients	Project Start, Update, and Project Exit
	4.06	Developmental Disability	All Clients	
	4.07	Chronic Health Condition	All Clients	
	4.08	HIV/AIDS	All Clients	
	4.09	Mental Health Disorder	All Clients	
	4.10	Substance Use Disorder	All Clients	
	4.11	Domestic Violence	HOH and Adults	Project Start, Update

Universal Data Elements (UDEs)

Universal Data Element requirements vary by project type and household member. For example:

- **Name** is required for all household members for all project types.

- **Veteran Status** is required for all adults in all project types.

- **Project Start and Exit Dates** are required for all household members in all project types.

- **Housing Move-in Date** is required for heads of households in permanent housing projects.

Grantees must enter UDEs for all clients, where applicable, who are **actively** enrolled on May 31st as well as all clients who enter after May 31st.

Grantees creating new projects are not required to enter data for clients who exited the program before the project was set up in HMIS.

Common Data Elements (CDEs)

- Common Data Elements are collected for most programs participating in HMIS. BHBH grantees are required to collect the CDEs applicable for the project type.

- Data elements are collected at different stages of enrollment. For example: income is collected at project start, anytime a client provides an update to a caseworker, annual assessments, and at project exit.

- Grantees creating new projects do not need to enter the CDEs as of project start for clients who entered the program before the project was created, but they will need to enter CDEs for all clients that enroll on or after May 31st, 2024.

Key Dates for Client-Level Data

All client dates must be within the project operating dates.

Project Start Date: The date the client started receiving services and/or housing from the project.

Housing Move-in Date: The date the client moved into permanent housing. This date cannot be earlier than the project start date or later than the project exit date. (PH–RRH projects only)

Project Exit Date: The date the client exited from the project and/or ceased receiving services from the project.
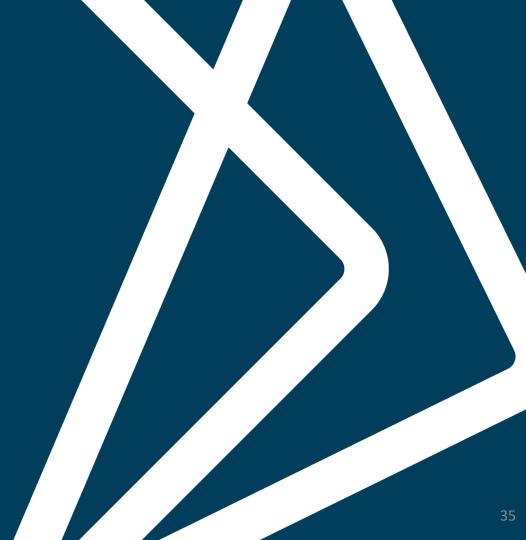
Let's Review

Support & Next Steps

Additional Support

1. Upcoming AB 977 Office Hours

   - More details to come

2. Ask questions or request 1:1 assistance with AB 977 or HMIS-related questions: AB977_TA@abtassoc.com

3. Pre-recorded trainings:

   - [HMIS 101: Demystifying HMIS Webinar](#)

   - [Trauma-Informed and Equitable Data Collection Webinar](#)

Your Next Steps

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Q&A

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AB977_TA@abtassoc.com

Evaluation