# HMIS Program Setup, Services Setup Data Quality Training

Facilitators/HMIS Administrators:

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**Tuesday September 23, 2025** 



### Agenda

- Welcome and Intro
- The Purpose of the training
- HMIS Overview
  - > Importance of Accurate Data
  - **→** How HMIS Supports Agency Programs and Funding
- Program Setup
- Services Setup
- Data Quality
  - > Understanding Data Quality
  - > Common Data Quality Issues and Their Impact
- Data Quality Training-Live Demonstration
- Support & Resources

## The Purpose of the Training

Today, we'll focus on how to properly set up programs, enter services, and maintain data quality in HMIS to ensure accurate reporting and improve client outcomes.

## HMIS Overview

#### **Importance of Accurate Data:**

Accurate data is essential because it ensures your agency can track client needs and outcomes effectively. High-quality data helps demonstrate your program's impact, supports decision-making, and fulfills reporting requirements for funders and stakeholders. Without accurate data, your agency risks losing funding, misrepresenting client needs, and missing opportunities for improvement.

How HMIS Supports Agency Programs and Funding:
 HMIS centralizes client and program data, making it easier to manage services, monitor progress, and generate required reports. Funders rely on HMIS data to evaluate program effectiveness and allocate resources. By maintaining strong data in HMIS, your agency can meet compliance standards, secure continued funding, and plan for future growth and service improvements.

## Program Setup

#### **Definition and Importance:**

Program Setup is the process of creating and configuring your projects within HMIS. It ensures that your agency's programs are accurately represented so that client data is captured correctly, and reports reflect true service delivery. Proper setup is crucial for meeting compliance and funding requirements.

#### **Key Components:**

- Project Type: Identifies the kind of program (e.g., Emergency Shelter, Rapid Re-Housing, Permanent Supportive Housing).
- Funding Source: Specifies where the program's funding comes from (e.g., CoC, ESG, local grants).
- **Bed/Unit Inventory:** Details the number and type of beds or units available for clients (important for shelters and housing programs).

#### **Common Setup Mistakes to Avoid:**

- Choosing the wrong project type, which can cause reporting errors.
- Leaving funding sources incomplete or inaccurate.
- Forgetting to update bed or unit inventory when changes occur.
- Entering incorrect start or end dates for projects or funding.
- Adding DV (Domestic Violence) data into HMIS DV providers must use a comparable database, not HMIS.

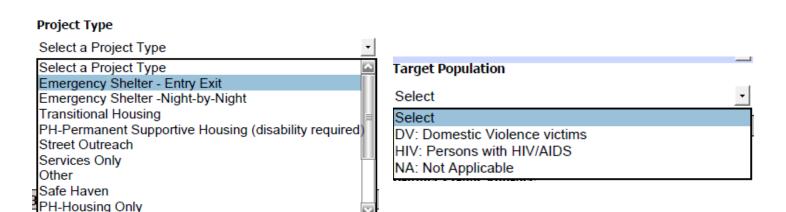
## Program Setup Form

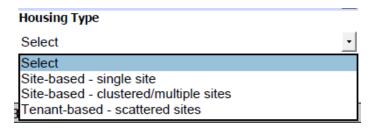
. Organization Information				
Organization Name			Victi	m Service Provider
2. Project Information				
Program Name			Cont	Yes No
Operating Start Date		Operating End Date	:	
Project Type		Affiliated with Resid	dential Project	
Select a Project Type	_	Select		
If RRH, RRH Subtype		Project affiliated wi	ith SSO	
Select	•			
Housing Type		HMIS Participating	Status	
Select Target Population	•	Select		
	•	HOPWA funded Med	dically Assisted Li	ving Facility
Select		Select		
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## Sections 1 & 2

1. Organization Information							
Organization Name				Victim Service Provider Yes No	r		
2. Project Information							
Program Name				Yes No			
Operating Start Date		Operating End Date					
Project Type		Affiliated with Reside	ential Proj	ject			
Select a Project Type If RRH, RRH Subtype	-	Select Project affiliated with	h SSO		•		
Select	-						
Housing Type		HMIS Participating S	tatus				
Select	-	Select			-		
Target Population		HOPWA funded Medi	cally Assis	sted Living Facility			
Select	•	Select			•		
3 Continuum of Care Information							

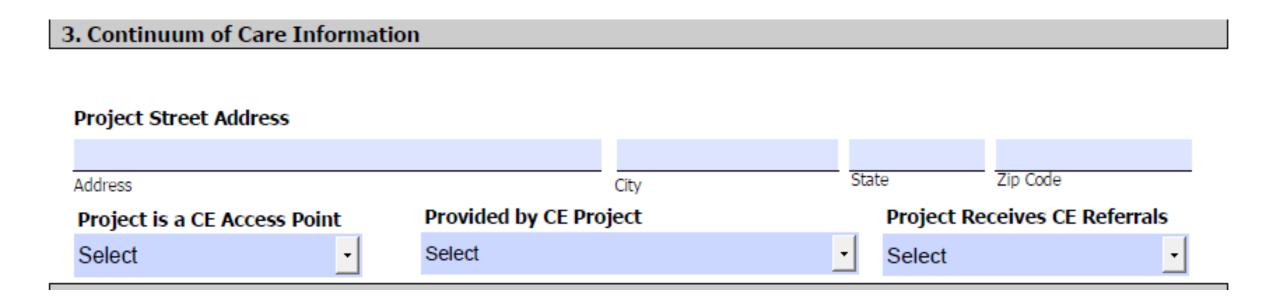
# Sections 1 & 2 (cont.)





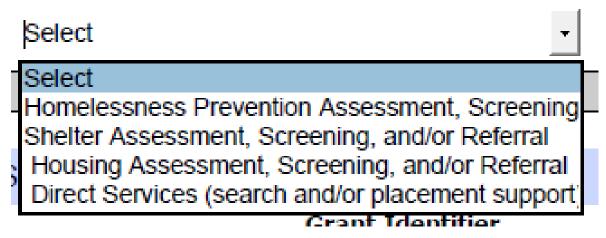
PH-Housing with Services (no disability required)
Day Shelter
Homeless Prevention
PH-Rapid Re-Housing
Coordinated Entry

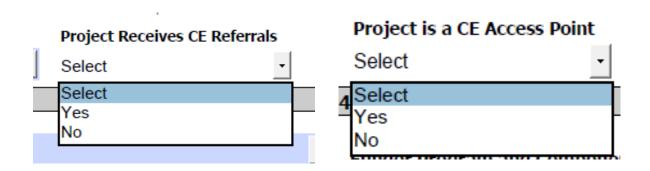
## Section 3



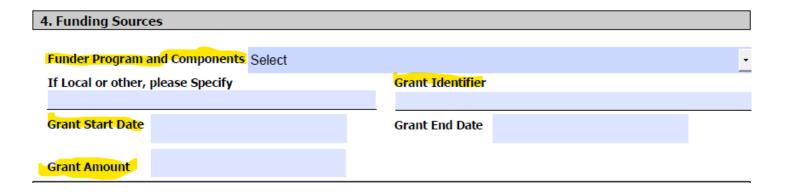
# Section 3 (cont.)

#### Provided by CE Project

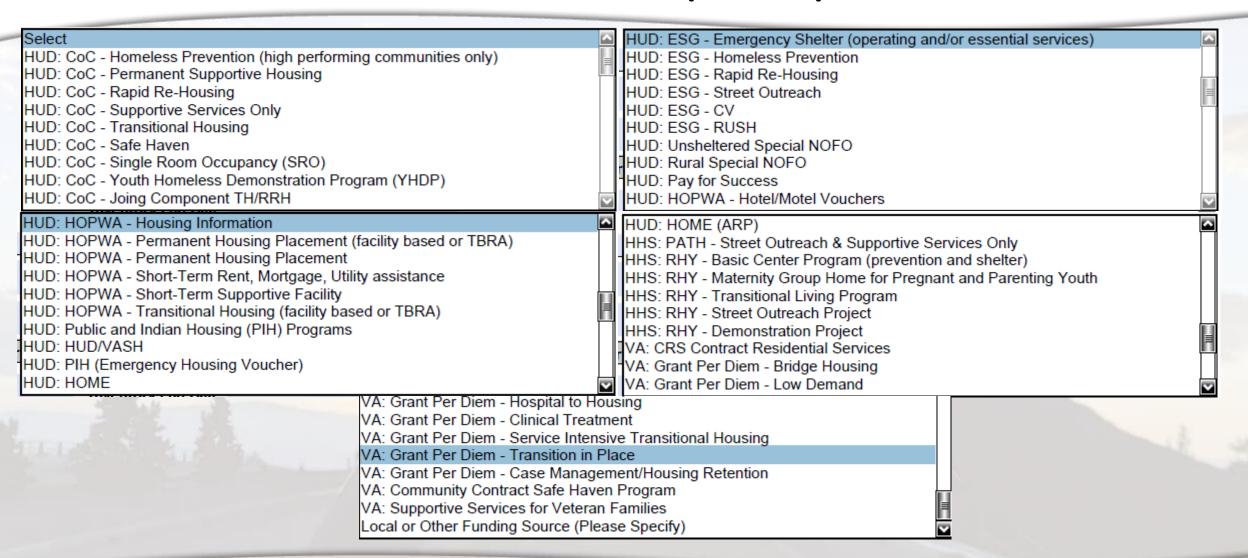




## Section 4

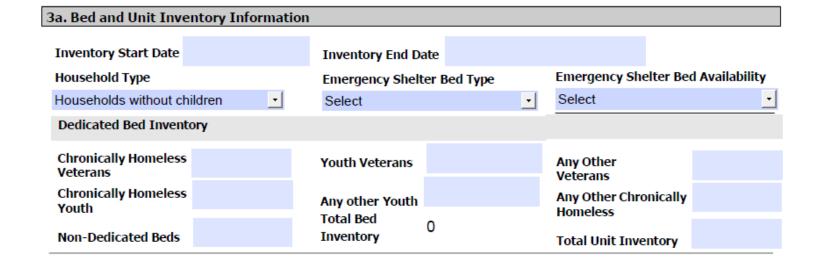


### Section 4 (cont.)

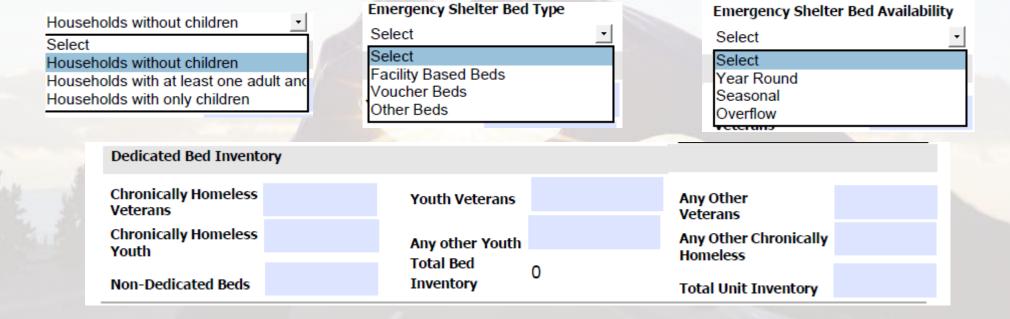




# Bed & Inventory Management



## **Bed & Inventory Management**





## Services Setup

## Services Setup

#### What Are Services in HMIS?

Services are the specific activities or support your agency provides to clients (e.g., case management, housing placement, food assistance). Tracking services in HMIS helps capture the types and frequency of support clients receive. There are two types of services, standalone and project based.

#### **Creating and Assigning Services to Programs:**

- Define each service your agency offers in HMIS.
- Link services to the correct program(s) so data is accurately tied to funding and reporting requirements.
- Set service categories based on what your agency provides.

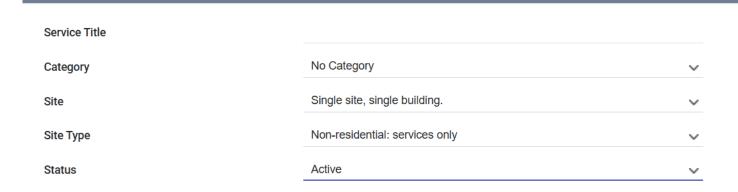
#### **Best Practices for Service Entry:**

- Enter services promptly and consistently.
- Ensure all required fields are completed.
- Document services accurately to reflect what was actually provided.
- Train staff regularly to maintain data quality.

#### **How Services Impact Reporting:**

- Service data is used to generate reports showing client engagement and outcomes.
- Accurate service tracking helps demonstrate program effectiveness to funders.
- Misaligned or missing service data can lead to incomplete or inaccurate reports, affecting funding and program evaluation.

## Services Setup



## Service Setup (cont.)

Safety Net Services

**HUD-VASH Voucher Tracking** 

#### No Category AIDS-Related Alcohol and Drug Abuse Case Management Child Care Credit Repair Education **Employment** Financial Food Health Care Housing Housing Search and Placement Legal Services Life Skills Mental Health Motel and Hotel Vouchers Moving Cost Assistance

Moving On Assistance Provided

Rental Assistance

# Security Deposit Transportation Utility Deposit Utility Payments Other HOPWA Service PATH Funded Service RHY Service VA SSVF Service

### Service Setup (cont.)

#### Single site, single building.

Single site, multiple buildings.

Multiple sites.

#### Non-residential: services only

Residential: special needs and non-special needs

Residential: special needs only

#### Active

Inactive



## **Data Quality**

## **Understanding Data Quality**

Good data quality means your HMIS records are:

- Complete: All required fields are filled out.
- Accurate: Information entered matches what actually happened.
- Timely: Data is entered as close to real-time as possible, always within 10 days or less.

Maintaining all three ensures that your agency meets compliance requirements and can trust the data for reporting and decision-making.

### Common Data Quality Issues and Their Impact

- Missing entry or exit dates: Can lead to inaccurate length-of-stay reporting
- Duplicate client records: Skews data and affects counts
- Incomplete assessments: Impacts funding reports (e.g., APR, CAPER)
- Incorrect household relationships: Affects household-level reporting and services

These issues can result in underreporting, compliance concerns, and missed funding opportunities.

## **Data Quality**

## Tools and Reports to Monitor Data Quality

- •Data Quality Report (DQ Report): Identifies missing or incorrect fields
- •APR (Annual Performance Report) / CAPER: Used for HUD-funded programs
- •Client Detail and Entry/Exit Reports: Help monitor data entry patterns
- •Monthly data checks or internal audits: Recommended for ongoing quality control

#### **How to Fix Common Errors**

Run	Regularly run DQ reports and review flagged issues
Correct	Correct missing or inaccurate fields in real-time when possible
Train	Train staff to recognize and avoid common entry errors
Use	Use internal review checklists before submitting reports



### **Data Quality Training**

**Live Demonstration!** 



## Open Discussion and Questions

## Support & Resources

#### **Contact Information for HMIS Support**

**HMIS Help Desk:** hmissupport@kernhmis.com

- **Phone Support:** (661) 208-4647
- Office Hours: The last Wednesday of the month @ 1:30pm-2:30pm
- Live Support Trainings: Upon Request

**Reminder:** Please do not submit any personal information, such as SSN, DOB, etc.

Always include the client ID and a brief description when submitting a ticket.

#### **Additional Learning Resources**

- HMIS Policies and Procedures
- Data Quality Plan
- HMIS Training Manual
- HUD Exchange HMIS Resources: https://www.hudexchange.info/programs/hmis/
- HMIS Data Standards Manual



