

HMIS Program Setup, Services Setup Data Quality Training

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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

Kern County HMIS		Agency Form: HMIS Program Descriptors	
1. Organization Information			
Organization Name		Victim Service Provider ☐ Yes ☐ No	
2. Project Information			
Program Name		Continuum Project ☐ Yes ☐ No	
Operating Start Date		Operating End Date	
Project Type		Affiliated with Residential Project	
Select a Project Type If RRH, RRH Subtype		Select	
Select		Project affiliated with SSO	
Housing Type		HMIS Participating Status	
Select		Select	
Target Population		HOPWA funded Medically Assisted Living Facility	
Select		Select	
3. Continuum of Care Information			
Project Street Address			
Address		City	State Zip Code
Project is a CE Access Point	Provided by CE Project	Project Receives CE Referrals	
Select	Select	Select	
4. Funding Sources			
Funder Program and Components Select			
If Local or other, please Specify		Grant Identifier	
Grant Start Date		Grant End Date	
Grant Amount			
3a. Bed and Unit Inventory Information			
Inventory Start Date		Inventory End Date	
Household Type		Emergency Shelter Bed Type	
Households without children		Select	
		Emergency Shelter Bed Availability	
		Select	
Dedicated Bed Inventory			
Chronically Homeless Veterans	Youth Veterans	Any Other Veterans	
Chronically Homeless Youth	Any other Youth	Any Other Chronically Homeless	
Non-Dedicated Beds	Total Bed Inventory	Total Unit Inventory	
	0		

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Sections 1 & 2

1. Organization Information	
Organization Name 	Victim Service Provider ☐ Yes ☐ No

2. Project Information	
Program Name 	Continuum Project ☐ Yes ☐ No
Operating Start Date	Operating End Date
Project Type Select a Project Type	Affiliated with Residential Project Select
If RRH, RRH Subtype Select	Project affiliated with SSO
Housing Type Select	HMIS Participating Status Select
Target Population Select	HOPWA funded Medically Assisted Living Facility Select

3. Continuum of Care Information

Sections 1 & 2 (cont.)

Project Type

Select a Project Type

- Select a Project Type
- Emergency Shelter - Entry Exit
- Emergency Shelter -Night-by-Night
- Transitional Housing
- PH-Permanent Supportive Housing (disability required)
- Street Outreach
- Services Only
- Other
- Safe Haven
- PH-Housing Only

Target Population

Select

- Select
- DV: Domestic Violence victims
- HIV: Persons with HIV/AIDS
- NA: Not Applicable

Housing Type

Select

- Select
- Site-based - single site
- Site-based - clustered/multiple sites
- Tenant-based - scattered sites

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

Section 3

3. Continuum of Care Information

Project Street Address

Address	City	State	Zip Code

Project is a CE Access Point

Provided by CE Project

Project Receives CE Referrals

Section 3 (cont.)

Provided by CE Project

Select

Select

Homelessness Prevention Assessment, Screening
Shelter Assessment, Screening, and/or Referral
Housing Assessment, Screening, and/or Referral
Direct Services (search and/or placement support)

Grant Identifier

Project Receives CE Referrals

Select

Select

Yes

No

Project is a CE Access Point

Select

Select

Yes

No

Section 4

4. Funding Sources

Funder Program and Components

Select

If Local or other, please Specify

Grant Identifier

Grant Start Date

Grant End Date

Grant Amount

Section 4 (cont.)

Select	HUD: ESG - Emergency Shelter (operating and/or essential services)
HUD: CoC - Homeless Prevention (high performing communities only)	HUD: ESG - Homeless Prevention
HUD: CoC - Permanent Supportive Housing	HUD: ESG - Rapid Re-Housing
HUD: CoC - Rapid Re-Housing	HUD: ESG - Street Outreach
HUD: CoC - Supportive Services Only	HUD: ESG - CV
HUD: CoC - Transitional Housing	HUD: ESG - RUSH
HUD: CoC - Safe Haven	HUD: Unsheltered Special NOFO
HUD: CoC - Single Room Occupancy (SRO)	HUD: Rural Special NOFO
HUD: CoC - Youth Homeless Demonstration Program (YHDP)	HUD: Pay for Success
HUD: CoC - Joing Component TH/RRH	HUD: HOPWA - Hotel/Motel Vouchers
HUD: HOPWA - Housing Information	HUD: HOME (ARP)
HUD: HOPWA - Permanent Housing Placement (facility based or TBRA)	HHS: PATH - Street Outreach & Supportive Services Only
HUD: HOPWA - Permanent Housing Placement	HHS: RHY - Basic Center Program (prevention and shelter)
HUD: HOPWA - Short-Term Rent, Mortgage, Utility assistance	HHS: RHY - Maternity Group Home for Pregnant and Parenting Youth
HUD: HOPWA - Short-Term Supportive Facility	HHS: RHY - Transitional Living Program
HUD: HOPWA - Transitional Housing (facility based or TBRA)	HHS: RHY - Street Outreach Project
HUD: Public and Indian Housing (PIH) Programs	HHS: RHY - Demonstration Project
HUD: HUD/VASH	VA: CRS Contract Residential Services
HUD: PIH (Emergency Housing Voucher)	VA: Grant Per Diem - Bridge Housing
HUD: HOME	VA: Grant Per Diem - Low Demand
	VA: Grant Per Diem - Hospital to Housing
	VA: Grant Per Diem - Clinical Treatment
	VA: Grant Per Diem - Service Intensive Transitional Housing
	VA: Grant Per Diem - Transition in Place
	VA: Grant Per Diem - Case Management/Housing Retention
	VA: Community Contract Safe Haven Program
	VA: Supportive Services for Veteran Families
	Local or Other Funding Source (Please Specify)



Bed & Inventory Management

3a. Bed and Unit Inventory Information			
Inventory Start Date		Inventory End Date	
Household Type	Households without children	Emergency Shelter Bed Type	Select
	Households without children		Select
Dedicated Bed Inventory			
Chronically Homeless Veterans		Youth Veterans	
Chronically Homeless Youth		Any other Youth	
Non-Dedicated Beds		Total Bed Inventory	0
		Any Other Veterans	
		Any Other Chronically Homeless	
		Total Unit Inventory	

Bed & Inventory Management

Households without children ▼
Select
Households without children
Households with at least one adult and
Households with only children

Emergency Shelter Bed Type
Select ▼
Select
Facility Based Beds
Voucher Beds
Other Beds

Emergency Shelter Bed Availability
Select ▼
Select
Year Round
Seasonal
Overflow
Veterans

Dedicated Bed Inventory			
Chronically Homeless Veterans		Youth Veterans	
Chronically Homeless Youth		Any other Youth	
Non-Dedicated Beds		Total Bed Inventory	0
		Any Other Veterans	
		Any Other Chronically Homeless	
		Total Unit Inventory	



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 Title

Category

Site

Site Type

Status

No Category

Single site, single building.

Non-residential: services only

Active

Service Setup (cont.)

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

Safety Net Services
Security Deposit
Transportation
Utility Deposit
Utility Payments
Other
HOPWA Service
PATH Funded Service
RHY Service
VA SSVF Service
HUD-VASH Voucher Tracking

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



Thank you

