Pennsylvania HMIS (PA HMIS)
2020 Data Standards Update Guide

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Introduction

The following guide provides a detailed review of any data element changes that will occur to the PA HMIS system for the upcoming 2020 HUD HMIS Data Standards update. <u>This update will be released into the live/production system for the morning of Wednesday October 2nd, 2019</u>.

The update is separated into four main sections to assist in reviewing only the data standard updates and changes that may affect your programs. The sections are separated into updates that will affect all programs and users, a section on program/funding type specific changes, and a final section for report and exports
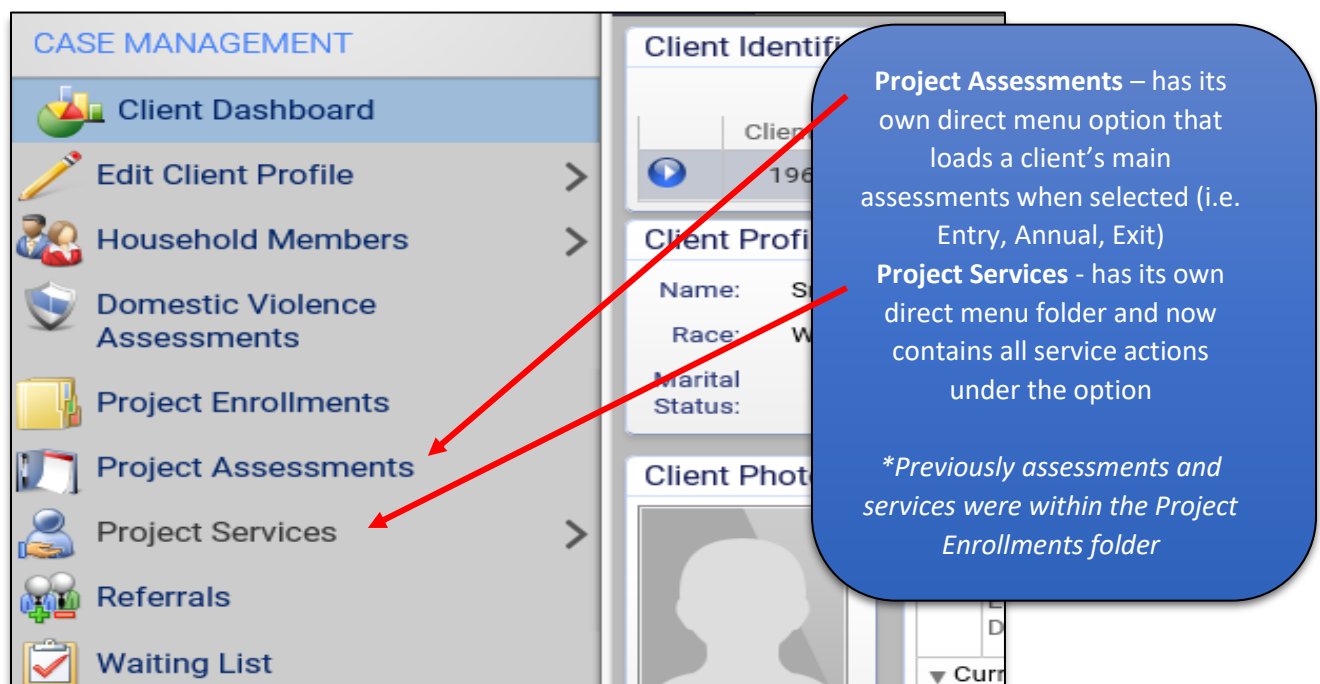
General System Updates

The following section details each data element or system function that will be updated and is collected by all system programs and are a part of standard system usage.

Case Management Menu

The Case Management Menu within the Client section for the main HMIS data collection Workgroups, for HMIS Programs and PATH/Street Outreach were slightly updated to improvement visibility and access to functions, specifically for Assessments and Services. Within both Workgroups directly below the Project Enrollments option the menu will now directly display the Projects Assessments and Project Services options.

No changes in terms of functionality have occurred with this menu update for any menu item or its functionality; the assessment and service features were previously contained under the Project Enrollment menu option have been moved directly placed into the main menu for more exposure.

Project Assessments – has its own direct menu option that loads a client's main assessments when selected (i.e. Entry, Annual, Exit)
Project Services - has its own direct menu folder and now contains all service actions under the option

Previously assessments and services were within the Project Enrollments folder
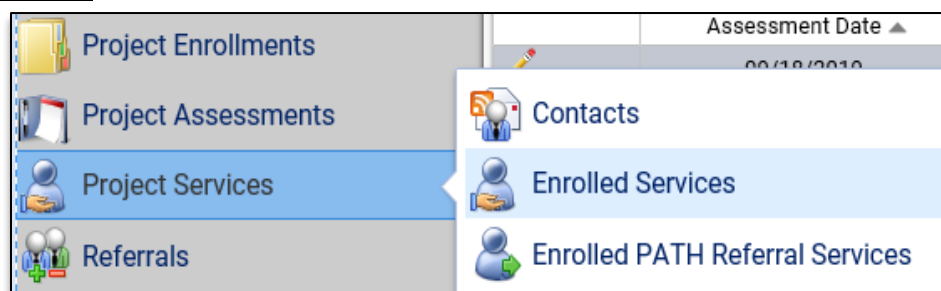
Project Services

The Project Services menu folder will differ slightly between Workgroups based on the data collection needs of the different type of programs.   Selecting the options within the Project Services folder will allow you to review any existing service records and performance data collection functions.

HMIS Programs Workgroup: this workgroup for residential and non-Outreach / non-PATH service projects will now contain the options for Bed Check In History and for Enrolled Services.
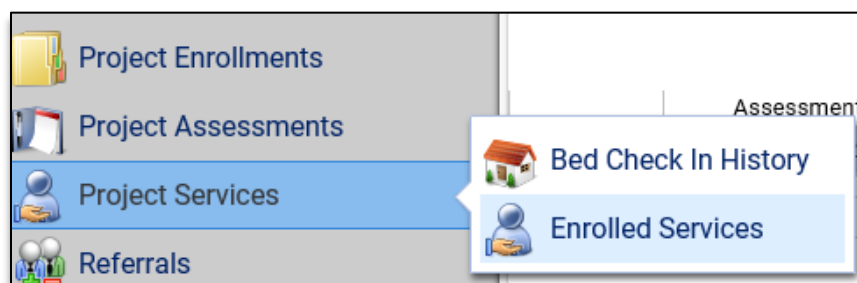
PATH / Street Outreach Workgroup: this workgroup for street outreach and PATH funded service projects will now contain the options for Contacts, Enrolled Services and Enrolled PATH Referral Services.

Contacts are now placed within the Project Services folder and will contain Contact and Outreach Services previously contained in the Pre-Enrollment Contacts menu option for Street Outreach / PATH programs.   Contacts are being replaced in the 2020 update with a new element called Current Living Situation, please refer to that section below for more details this change.

Client Enrollment Display

When viewing a client's enrollments on their Client Dashboard or through the Project Enrollments menu option the system will now show some additional information for each program stay.   Each enrollment record will now display the number of Active Case Members, the Household Type and the number of days enrolled.

All existing elements for each Workgroup will remain visible, as the new columns are only for informational purposes and will not affect any functionality or options.

- Active Case Members – displays the number of household members that are actively still enrolled in the program as of the current day (contrasts against the Total Case Members which is the overall number of household members enrolled together in a program enrollment).
- Household Type – identifies the type of household based on its included case members and their ages; follows HUD's household categorization.
- Days Enrolled – provides the number of days enrolled between Project Start and Project End Date or the current date if the enrollment is still active.

Health Barriers

There is a change in terms of data collection for two health barriers, Developmental Disability and HIV/AIDS, and when a person is identified with either of these conditions the follow-up question for whether the Condition is Indefinite (expected to be of long-continued and indefinite duration and substantially impair the client's ability to live independently) is no longer required and will not prompt within the assessment.

Those persons presenting with a Developmental Disability or with HIV/AIDS are identified as having a Disabling Condition without the condition being indefinite. The other 5 health barriers will continue to

require the follow-up Condition is Indefinite element when the barriers are present to help determine if they disabled.

The HMIS will continue to update a person's Disabling Condition element to Yes when any barrier is present and identified as indefinite or when presenting with a developmental disability or HIV/AIDS.

Prior Living Situation / Destination Lists

The new standards have made some updates to the Prior Living Situation list for the Type of Residence question within Living Situation element in the Universal Data assessment along with the Destination list when exiting a client. The changes will not affect any direct functionality but do expand the selections available for each element.   Below is a grid listing all available responses and whether they are selectable within one or both of the element lists; they are grouped by homeless, institutional, temporary and permanent and other categories.

Those responses highlighted in green are new with the new standards and be available after the update.

Response	Prior Living Situation	Destination
Homeless Situations		
Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)	X	X
Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or RHY-funded Host Home shelter	X	X
Safe Haven	X	X
Institutional Situations		
Foster care home or foster care group home	X	X
Hospital or other residential non-psychiatric medical facility	X	X
Jail, prison or juvenile detention facility	X	X
Long-term care facility or nursing home	X	X
Psychiatric hospital or other psychiatric facility	X	X
Substance abuse treatment facility or detox center	X	X
Temporary and Permanent Housing Situations		
Residential project or halfway house with no homeless criteria	X	X
Hotel or motel paid for without emergency shelter voucher	X	X
Transitional housing for homeless persons (including homeless youth)	X	X
Host Home (non-crisis)	X	X
Staying or living with friends, temporary tenure (e.g. room, apartment or house)		X
Staying or living in a friend's room, apartment or house	X	
Staying or living with family, temporary tenure (e.g. room, apartment or house)		X
Staying or living with family, permanent tenure		X
Staying or living in a family member's room, apartment or house	X	
Staying or living with friends, permanent tenure		X

Moved from one HOPWA funded project to HOPWA PH		X
Moved from one HOPWA funded project to HOPWA TH		X
Rental by client, with GPD TIP housing subsidy	X	X
Rental by client, with VASH housing subsidy	X	X
Permanent housing (other than RRH) for formerly homeless persons	X	X
Rental by client, with RRH or equivalent subsidy	X	X
Rental by client, with HCV voucher (tenant or project based)	X	X
Rental by client in a public housing unit	X	X
Rental by client, no ongoing housing subsidy	X	X
Rental by client, with other ongoing housing subsidy	X	X
Owned by client, with ongoing housing subsidy	X	X
Owned by client, no ongoing housing subsidy	X	X
Other		
No exit interview completed		X
Other		X
Deceased		X
Client doesn't know	X	X
Client refused	X	X
Data not collected	X	X

Interim Housing

With the Prior Living Situation responses listed above, the selection for Interim Housing was removed from the list and will no longer be an available choice.   Along with Interim Housing no longer being an available selection HUD has determined it is be an invalid response for any person that it had been used for in the past.

HUD's guidance now states that any client that has Interim Housing as their Prior Living Situation is invalid and will show up as "missing" data in future official reporting.   All clients that had had this entered as their Prior Living Situation should go back and change this value to a valid response from the available list based on their residence at project entry.

To locate any clients that have that response recorded in any of your programs, the recommendation is to use the **Client Demographics Query** report as shown below.   It is located within the Case Manager Reporting -> Client Program Reporting -> Demographics Report folder.
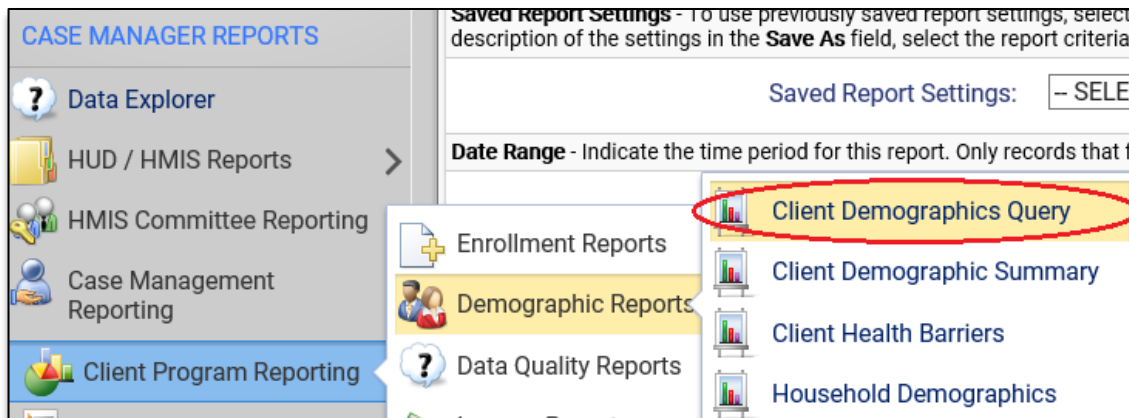
After loading this report, use the dates of 1/1/2016 to the current day, include all your Organizations and Programs, and within the demographic filters at the bottom of the screen scroll down and select the Prior Residence filter and only include Interim Housing (do not include any other demographic filters).
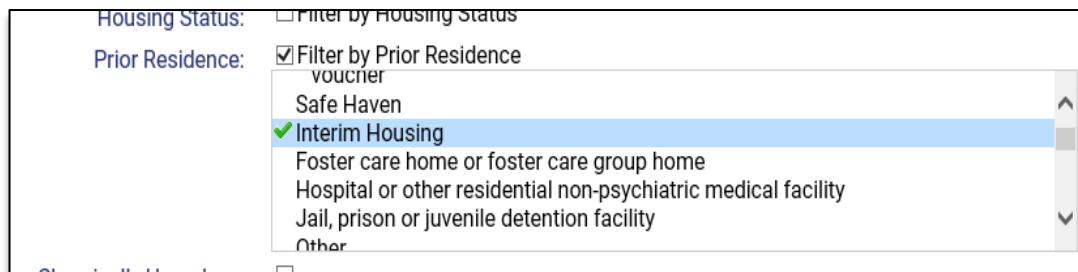
Running the report will return on the clients enrolled with Interim Housing as their Prior Residence / Prior Living Situation.   For any client returned this value needed updated to another response; the recommendation is to load them through the Find/Add Client and use the Edit Enrollment Workflow to get to the Universal (HMIS) Data assessment to make the change and save the new value.

Education Assessment

The Education assessment, for both adults and children, is now required to be collected at Project Exit for certain funding types.   Previous data standards have only needed its collection at entry; the update will now display the education assessment by default at exit for all non-Street Outreach and non-PATH program and funding types.

For those funding and programs types in which it is not required a Skip Assessment option will be available to move past the assessment.   Education assessments will be required for SSVF and non-Street Outreach RHY projects at both Entry and Exit after the update.

Annual Assessments

With the new standards taking effect there is one rule change for Health Barriers and another clarification for what determines the anniversary timeframe for when annual assessments should be collected and how they should be dated.

Health Barriers

Health Barriers will no longer be required to be collected for Annual assessments, with the remaining important assessment being the Universal (HM(S) Data assessment for Health Insurance and the Financial Assessment for Income and Non-Cash Benefits.

While the Health Barrier assessment will remain available within Annual, as well During Enrollment assessments for data collection, they will no longer be required to be completed for official reporting like APR or CAPERs.

Anniversary Dates

An Annual assessment is required for all persons that remain enrolled in a program for longer than 1 year and are required to be collected on a yearly basis within their anniversary date range.

For clarification purposes, every person's "anniversary date range" for an Annual assessment is based on the Head of Household and their enrollment date and length of time in the project (not the individual household members).

The anniversary date is exactly 1 year forward from the Head of Household's enrollment date and when that date is crossed, the head of household and all other current members of the household should have their Annual assessments collected at the same time. The anniversary date range allows for 60 days in variation and all household members Annual assessment can be up to 30 days prior to or up to 30 days after the Head of Household's anniversary date.

This an important note for those household members added to an enrollment at different time, as once the Head of Household is required to have an Annual assessment for the year all household members are required to have an Annual assessment for the year (even if a household member has not themselves been enrolled for 1 year or longer). All household members should have their Annual assessment and associated assessment dated within the same head of household anniversary timeframe.

The Annual Assessment Data Quality Check, Client Program Data Quality and HUD Data Quality/APR Details reports are good sources for reviewing household member's annual assessment requirements and anniversary date ranges based on the Head of Household. They can be located within the Case Manager Reporting -> Client Program Reporting -> Data Quality Reports folder.

Funding and Program Type Specific Updates

The following section details changes to specific program types or funding groups and affects those agencies and users that serve clients within those programs.

Current Living Situation (Street Outreach / PATH only)

This new element has now replaced Contacts for Street Outreach and PATH funded projects and collects information about a client's current living situation as well as recording an instance of a contact /

engagement occurring.   The element is required to be collected on a per contact basis for all adults or head of households served by your program.

A Current Living Situation record is required to be collected at entry into your program, which for Street Outreach projects should be at the time of initial contact, and every time contact is made with a person during their enrollment.   Contacts that require the collection of a new Current Living Situation record include activities such as a conversation between a street outreach worker and client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service.

The Current Living Situation element consists of the following base questions and include the <u>Date of Contact</u>, <u>Enrollment</u> and the client's current <u>Living Situation</u>. The Living Situation provides a list of responses to choose from and is almost identical to the Prior Living Situation list mentioned above.

Date of Contact:*	09/18/2019 📅
Enrollment:*	09/18/2019 - HMIS Service - RHY SOP ∨
Living Situation Information	
Living Situation:*	-- SELECT -- ∨
Location Detail:	

Please note that for PATH funded projects the Living Situation responses are limited to a small number of selections which only include the 3 homeless situations, along with Other and Worker unable to determine; the additional questions shown below will not be required for PATH funded programs.

For those client's in a temporary, permanent or other non-homeless situation the record will prompt for follow-up questions to record additional information to support the determination of imminent and at-risk of homelessness housing statuses based on HUD's definition of homelessness.

The initial follow-up question is if the client is going to have to leave their current living situation within the next 14 days.   If the answer is anything but Yes, the record is completed.

Living Situation Information	
Living Situation:*	Psychiatric hospital or other psychiatric facility ∨
Is client going to have to leave their current living* situation within 14 days:	No ∨

If the person is leaving their current living situation in the next 14 days, four additional follow-up questions are requested and can be answered with Yes, No or Client Doesn't Know/Refused responses to support the determination of imminent and at-risk of homelessness housing statuses.

Once answering these questions, the Current Living Situation or a Living Situation record, can be completed.

Every Living Situation record also allows for the collection of a Contact or Outreach service record at the same time by checking the "Record Contact" option and filling out the contact service below. This is not required but can be beneficial for programs that are used to contact service method and can continue to do so along with capturing the new Living Situation information.

Current Living Situation will automatically prompt for collection for all Head of Household and Adults persons enrolled into a Street Outreach or PATH funded project.   Each additional contact that requires a new Living Situation record to be completed can be created using the new **Living Situations** option available in the Case Management Menu under within the PATH/Street Outreach Workgroup

When selecting the **Living Situations** option, all existing records will be available to edit or delete using the meu options. Using the **Add New Living Situation** button will allow for the collection of a new living situation record when needed for clients.
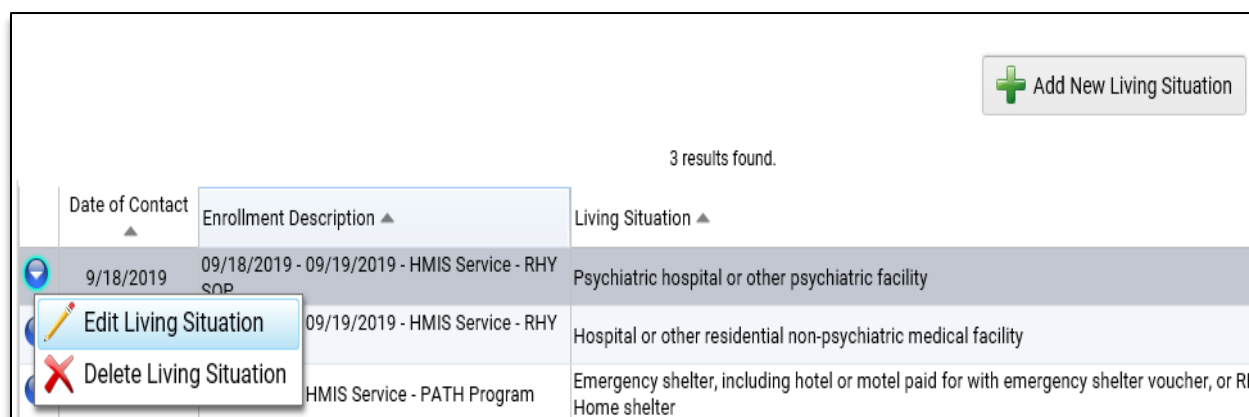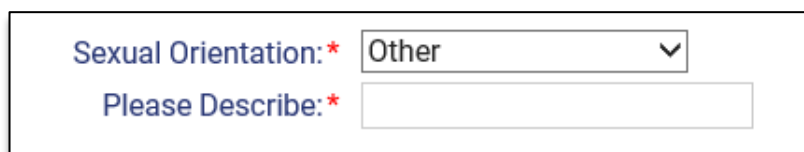

While Contact service records can still be recorded from within the Project Services -> Contacts option, the new method for collecting Contacts for Street Outreach and PATH projects will be the Living Situation element and records going forward.

Data Conversion Note: once this update is released all previous Contact and Outreach records, those that resided in the "Pre-Enrollment Contacts" folder, will automatically be converted into Living Situation records. Each Contact or Outreach records will have a new corresponding Living Situation record in the Living Situations folder above; the original Contact service record will still exist and can be found in the Contacts option under the Project Services folder.

FYSB: Runaway and Homeless Youth (RHY)

For all RHY funded projects a small update will occur regarding the Sexual Orientation element required to be collected at enrollment through the RHY Entry Assessment.

A new response of "Other" has been added the orientation list, and when selecting this option the assessment will prompt a Please Describe field to require a manual text answer / description from the client.

VA: Supportive Service for Veteran Families (SSVF)

Three additional Services and one additional Financial Assistance Service has been added to each SSVF funded program, rapid rehousing and prevention, to provide to clients.   The list of new Services and Financial Assistance are listed below:

Services

- Extended Shallow Subsidy
- Rapid Resolution
- Returning Home

Financial Assistance

- Extended Shallow Subsidy – rental assistance

Data and Report CSV Exports

The following section details the new versions of exports that will be available in system and are separated by type below.   The new CSV version is universally labeled as 2020 for all new exports. In most cases the previous version, labeled CSV 6.1 or 2018 will remain available as well until no longer needed.

APR / CAPER Exports

Along with the new data standards the PA HMIS is also releasing a new version of the Continuum of Care (CoC) APR and Emergency Solutions Grant (ESG) CAPER Exports.   The new APR and CAPER will be named version 2020 and provide any updates necessary to match the new standards and will be available under the following exports:

- APR for CoC Projects 2020 Export
- ESG CAPER 2020 Export

The 2020 APR and CAPER have no changes in terms of how they are generated or retrieved through the Files on Server page and can be found within the Case Manager Reports -> HUD / HMIS Reports ->

HUD APR / ESG Exports folder as shown below.   The 2020 APR and CAPER Exports will also be located and available within the Data CSV Export section of the system and noted in the next section.

For back-wards compatibility the system will also keep the version 2018 exports for each available within the same area until they are no longer deemed necessary.   The accompanying HUD Data Quality Report, HUD Data Quality/APR Details Report and APR, ESG, Data Quality Details Export will all be updated to the new 2020 standards as well.

*Please note that HUD will require the submission of all APRs and CAPERs on or after October 1*st*, 2019 to use the new 2020 version.*
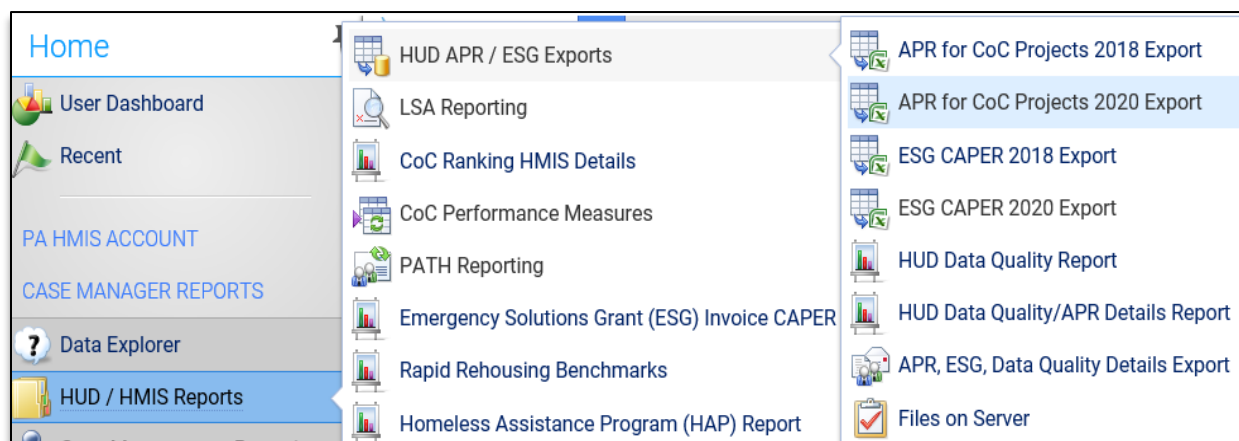

Data CSV Exports

With the new data standards there is also a new round of CSV data exports, which all will be named version 2020 (i.e. CSV 2020). These new versions will provide data to match the new updates and will be available as under following exports:

- SSVF Data Export - CSV 2020
- RHY Data Export - CSV 2020
- HMIS Data Export - CSV 2020

For back-wards compatibility the system will also keep the version 6.1 exports for each available within the same area. The exports can be generated and run in the exact same way as before, the only difference with the file structure changing slightly in the new versions to account for any data standards changes.

These exports can still be located within Data Import/Export Tools -> Exports folder as shown below. The data import/export tools folder can be located within either the Agency Manager or Assistant Manager folders on the HOME tab for those with managerial user access.
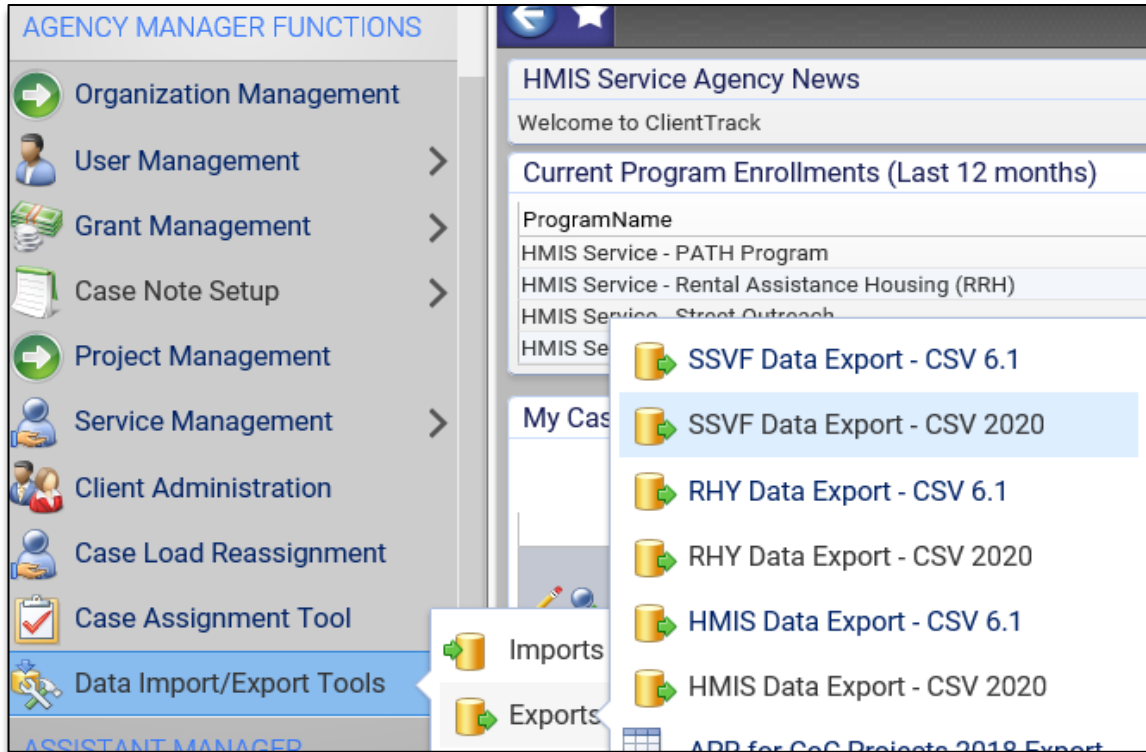
The Exports folder will also contain the new 2020 export versions for the Continuum of Care (CoC) APR and Emergency Solutions Grant (ESG) CAPER and can be generated within this section as well.

HUD Resources

The 2020 HUD HMIS Data Standards Manual and Data Dictionary can be found at the links below for a more complete and in-depth view of the update:

2020 HUD HMIS Data Standards Manual
2020 HUD HMIS Data Dictionary