HMIS Program Setup Checklist

This checklist will help you gather the information needed to fill out the New Program Request Form to request a new HMIS program. The New Program Request Forms are located on the Sacramento Steps Forward New Agency and Programs webpage:

- Sacramento CoC-503 New Program or
- Yolo CoC-521 New Program

Once we have received your submission, we will begin building your program in HMIS and will contact you to set up a meeting to discuss your program request.

If you have any questions, please email us at hmis@sacstepsforward.org or join us during Open Office Hours.

General Overview Information

- ☐ Program Name (What will staff and clients call this program.)
- ☐ Program Location Information (including phone number)
- ☐ Agency the program belongs to (if the agency is not currently in HMIS, please review our detailed instructions online on how to request an Agency in HMIS.)
- ☐ Program Manager name & contact information

Funding Information

- ☐ Name of EACH Funding Source. Please see a list of funding sources below.
- ☐ Grant Identifier Agreement Number for EACH Funding Source
- ☐ Start date for EACH Funding Source and End date if known
- ☐ Grant Amount for EACH Funding Source

Program Demographics

- ☐ Description of your Program or Scope of Work
- ☐ Program Start Date
- ☐ Who your Program provides services to

☐ Program Type (e.g. Emergency Shelter, Permanent Supportive Housing, etc.). If you aren't familiar with program types, click on this link.

☐ Other Agencies and Programs this Program will be affiliated with

☐ For Emergency Shelters: What will be your Method of Tracking? Entry Exit or Night by Night

Emergency Shelters, Transitional Housing, and all Housing Programs

☐ Housing Sites: Site-based or Tenant-based

☐ Inventory
  ☐ Household Types the Program will serve: Adult ONLY, Family, or Child ONLY
  ☐ Number of Households the Program will serve by Household Type
  ☐ Any inventory dedicated to specific household demographics (e.g., Veterans, TAY, Chronically Homeless)
  ☐ Availability of the Inventory (i.e., Start dates, Seasonal information, etc.)

Coordinated Entry & Coordinated Access Systems

☐ Will this program receive referrals for new client enrollments from CES/CAS?
  ☐ If yes...
    ☐ Will enrollments be dedicated to specific populations?
    ☐ When will your staff and program be ready for referrals?
    ☐ Name and contact information of person to coordinate with CES/CAS Team for the referral process

Services & Assessments

☐ Select Services from our default list of services that your Program will provide to your clients. If you aren't familiar with HMIS Services, reference the list below.

☐ Provide a list of services your Program will provide that is NOT listed in our default list

☐ Select Assessment Tools from our default list that your Program would like to utilize. Please review the list of available assessments at this link.

☐ Provide information on Assessments or other Tools your Program would like to record in HMIS but is not part of our default list.

HMIS Resource Appendix

This document serves as comprehensive resource pages, detailing the specifics of various program items.

Services

Services available in HMIS:

Aids / HIV - Related Services
☐ HIV/AIDS Related Service
☐ Referral to HIV/AIDS Related Services

Alcohol & Substance Use Disorder Abuse Services
☐ Provided AOD Services
☐ Referred to AOD Services

Case Management: Documentation Assistance
☐ Assist / Complete HUD Required Homelessness Documentation
☐ Assist with obtaining Birth Certificate(s)
☐ Assist with obtaining Identification (e.g, CA ID, Driver's License)
☐ Assist with obtaining Income Verification
☐ Assist with obtaining Military Service Record (DD-214)
☐ Assist with obtaining Social Security Card(s)

Case Management: General
☐ Appointment Reminders
☐ Coordinate Care with other Community Providers
☐ General Case Management
☐ Provided Clothing
☐ Provided Hygiene Kit(s)
☐ Referral to Animal Services for Pet Care
☐ Referral to Community Resources
☐ Referral to Free Phone Program

Case Management: Health Care Services
☐ Assist with obtaining Health Insurance
☐ Assist with obtaining Prescribed Medications
☐ Connect to a Dental Care Provider
☐ Connect to a Primary Health Care Provider
☐ Connect to Home Health Nursing
☐ Connect to Mental Health Services
☐ Coordinate Care with Healthcare Providers
☐ Medical / Mental Health Appointment Reminders
☐ Referral to Grief Counseling
☐ Referral to Support Groups
☐ Support to Medical / Mental Health Appointment

Case Management: Housing & Homeless Prevention
☐ Eviction Prevention
☐ Housing Counseling
☐ Housing Stabilization Planning
☐ Landlord Mediation
☐ Referral to Rent Readiness Programs
☐ Tenant Rights and Responsibilities Education

Case Management: Income Benefits / Services
☐ Assist with Other Income Benefits
☐ Assist with Social Security Benefits (SSA)
☐ Assist with Social Security Disability Benefits (SSI/SSDI)

HMIS Resource Appendix

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- ☐ Assist with Unemployment Benefits
- ☐ Connect to Rep Payee Services
- ☐ Referral to Disability Rights Attorney
- ☐ Referral to Income Support Services

Case Management - Public Benefits
- ☐ Assist with obtaining CalFresh
- ☐ Assist with obtaining General Assistance (GA)
- ☐ Assist with obtaining Temporary Assistance for Needy Families (TANF)
- ☐ Assist with obtaining WIC

Case Management: Referral to Other Benefits / Services
- ☐ Referred to Alta Regional Center
- ☐ Referred to In Home Support Services (IHSS)
- ☐ Referred to the Department of Rehabilitation (DOR)

Case Management: Special Accommodations
- ☐ Advocate to meet Special Accommodation Needs
- ☐ Provide Assistive Services / Devices

Case Management: VA Benefits
- ☐ Connect to Veteran Specific Programs

Child Care
- ☐ Provided Child Care
- ☐ Referral to Child Care Services
- ☐ Subsidized Child Care

Credit Repair
- ☐ Credit Counseling / Education
- ☐ Credit Repair Fees
- ☐ Obtain Credit Report
- ☐ Paid Debt to Clear Credit

Education
- ☐ Assist with Enrollment in GED/High School Diploma Program
- ☐ Assist with obtaining Education Records including Attendance
- ☐ Assist with Secondary Education Enrollment
- ☐ Other Education Services
- ☐ Paid Other Education Expenses
- ☐ Paid Tuition Fees
- ☐ Provided Individualized Tutoring

Employment
- ☐ Assist with Resume / Job Application
- ☐ Assist with Vocation Training Application / Enrollment
- ☐ Interview Coaching
- ☐ Job Readiness Skills
- ☐ Job Search Coaching
- ☐ Referral to Community Employment Resources
- ☐ Vocational Expenses – Other
- ☐ Vocational Services - Other

Financial
- ☐ Paid for Prescribed Medications
- ☐ Paid Home Maintenance / Repairs
- ☐ Paid Identification Fees
- ☐ Paid Legal Document Fees
- ☐ Paid Medical, Mental Health, or Dental Expenses
- ☐ Paid Other Fees, Fines, or Expenses
- ☐ Paid Past Due Rent

HMIS Resource Appendix

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- ☐ Purchased Basic Household Supplies
- ☐ Purchased Emergency Supplies

Food Services
- ☐ Provided Food
- ☐ Referral to Community Resources for Food

Hotel / Motel Vouchers
- ☐ Hotel / Motel Voucher for Adult Only Households
- ☐ Hotel / Motel Voucher for Households with Minor Children

Housing Search and Placement
- ☐ Complete / Submit Housing Application(s)
- ☐ Facilitated Board and Care Placement
- ☐ Facilitated Family Re-Unification
- ☐ Facilitated Placement with Family / Friend(s)
- ☐ Linked to Housing Navigator
- ☐ Other Housing Search and Placement Services
- ☐ Paid Housing Application Fee
- ☐ Referral to Emergency Shelter
- ☐ Referral to Public/Private Agency for Hotel/Motel Voucher
- ☐ Researched Housing Opportunities

Legal Services
- ☐ Advocate/Mediate with Law Enforcement on the Client's Behalf
- ☐ Connect to Expungement Services
- ☐ Connect to Services for Civil Law
- ☐ Connect to Services for Criminal Law

- ☐ Connect to Services for Family Law (including Child Support)
- ☐ Connect to Tax Preparation Services
- ☐ Paid Legal Fees / Fines & Penalties
- ☐ Referral to Community Resources for Legal Advice and Services
- ☐ Referred to Legal Services of Northern California
- ☐ Life Skills
- ☐ Basic First Aid
- ☐ Basic Housekeeping
- ☐ Basic Vehicle Maintenance
- ☐ Communication Skills
- ☐ Emergency Preparedness
- ☐ Exercise and Nutrition
- ☐ Food Storage and Preparation
- ☐ Home Maintenance and Repairs
- ☐ Home Safety
- ☐ Money Management and Budgeting
- ☐ Parenting Education
- ☐ Sleep and Hygiene

Moving Cost Expenses
- ☐ Other Moving Costs
- ☐ Paid Moving Transportation
- ☐ Purchased Moving Supplies

Rental Assistance
- ☐ One Time Partial Rental Assistance
- ☐ One Time Full Rental Assistance

Security Deposit
- ☐ Paid Security Deposit

HMIS Resource Appendix

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Transportation

- ☐ Paid for Vehicle Repair / Maintenance
- ☐ Provided Bus Pass(es)
- ☐ Provided Gas Cards
- ☐ Staff Transported
- ☐ Transportation – Other

Utility Deposit

- ☐ Paid Utility Deposit

Utility Payment

- ☐ Utility Assistance
- ☐ Paid Past Due Utilities

Medical Health Care

Medical Health Care Provider Projects ONLY
- ☐ Pre-natal Care
- ☐ Primary Care Services
- ☐ Post-natal Care
- ☐ Referral to Specialty Care
- ☐ STD Testing

Mental Health

Mental Health Provider Projects ONLY
- ☐ Couple / Marriage Counseling
- ☐ Crisis Intervention / Management
- ☐ Family Counseling / Therapy
- ☐ Group Counseling / Therapy
- ☐ Individual Counseling / Therapy
- ☐ Mental Health Assessment

- ☐ Peer Counseling
- ☐ Psychological or Psychiatric Care

Other

- ☐ If you do not see a service your program needs, please indicate on the **Sacramento CoC-503 New Program** or **Yolo CoC-521 New Program,** the custom services you need built.

Assessments   [Go back to checklist](#)

Assessments available in HMIS:

- ☐ **VI-SPDAT:** The VI-SPDAT is a pre-screening, or triage tool, that is designed to be used by providers within a community to quickly assess the health and social needs of homeless persons and match them with the most appropriate support and housing interventions that are available. There are 3 different VI-SPDAT Tools.
    - ☐ Singles for Adults 25 years of age or older with no children
    - ☐ Families for Households with both Adults (18 years of age or older) and Minor Children (17 years of age and younger)
    - ☐ TAY for Transition Age Youth (18 to 24 years of age)

- ☐ **Self-Sufficiency Matrix:** Self-Sufficiency Matrix is a measurement tool that evaluates an individuals' level of independence and quality of life across a variety of domains. Staff can use this tool to guide service planning, assess

HMIS Resource Appendix

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client progress, and report outcomes to funders. The tool has 5 main uses/benefits: 1) case management tool, 2) client self-assessment tool, 3) management tool, 4) measurement tool, and 5) communication tool.

☐ **Rehousing Needs Assessment:** The Rehousing Needs Assessment is a case management tool that helps identify existing and needed resources a household may or may not need to achieve stable housing. The tool reviews current services the client may be receiving, services that may be needed, a rough financial budget, and if there are any natural supports that may help the client.

☐ **Shelter Survey:** The Shelter Survey is a survey that assesses a person's sheltering needs. It is a current requirement if you are hoping to refer a person(s) to a shelter program that receives its referrals via Coordinated Entry (CE), which is a Department that is managed by Sacramento Steps Forward.

☐ **Problem Solving - Request for Financial Assistance:** The Problem Solving - Request for Financial Assistance is a tool that is to be completed by staff on behalf of the client and their household for ONE-TIME financial assistance. The tool is used to determine how much financial assistance is needed to help a client secure and maintain stable

housing. Providers need to demonstrate that they have exhausted all other community resources prior to requesting assistance from the Problem Solving Funds and that the client has actively been involved with services to resolve their housing crisis.

☐ **Move-On Survey:** The SHRA Move On program offers a Housing Choice Voucher Survey to households who no longer need intensive services but still need affordable housing. Households need to have been in compliance with their service plan for the past 24 months, consistently paid monthly rent and utilities for the past 24 months or more, and have had NO lease violations in the past consecutive 12 months. The 1st phase of the Move On program focuses on households "graduating" from their current Permanent Supportive Housing (PSH) program enrollments. The Move On Survey is a short survey to determine if the household meets this criteria.

Funding Information

Funding Sources available in HMIS:

☐ Does this project receive any funds from the HUD McKinney Vento?
  ☐ Yes
  ☐ No
☐ HUD CoC: Homelessness Prevention
☐ HUD CoC: Permanent Supportive Housing

HMIS Resource Appendix

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- ☐ HUD CoC: Rapid Re-Housing
- ☐ HUD CoC: Supportive Services Only
- ☐ HUD CoC: Transitional Housing
- ☐ HUD CoC: Youth Homeless Demonstration Program (YHDP)
- ☐ HUD ESG: Emergency Shelter
- ☐ HUD ESG: Homelessness Prevention
- ☐ HUD ESG: Rapid Re-Housing
- ☐ HUD ESG: Street Outreach
- ☐ HUD HOPWA: Hotel/Motel Voucher
- ☐ HUD HOPWA: Housing Information
- ☐ HUD HOPWA: Permanent Housing (facility-based or TBRA)
- ☐ HUD HOPWA: Permanent Housing Placement
- ☐ HUD HOPWA: Short-Term Rent, Mortgage, Utility Assistance
- ☐ HUD HOPWA: Short-Term Supportive Facility
- ☐ HUD HOPWA: Transitional Housing (facility-based or TBRA)
- ☐ HUD VASH
- ☐ HHS PATH: Street Outreach & Supportive Services Only
- ☐ HHS RHY: Basic Center Program (prevention & shelter)
- ☐ HHS RHY: Maternity Group Home for Pregnant and Parenting Youth
- ☐ HHS RHY: Transitional Living Program
- ☐ HHS RHY: Street Outreach Project
- ☐ HHS RHY: Demonstration Project
- ☐ VA CRS: Contract Residential Services
- ☐ VA Grant Per Diem: Bridge Housing
- ☐ 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 Compensated Work Therapy Transitional Residence
- ☐ VA Supportive Services for Veteran Families
- ☐ NONE OF THESE

Other Project Funding Source
- ☐ Affordable Housing Program (AHP)
- ☐ American Rescue Plan Act (ARPA)
- ☐ Bringing Families Home [CA-CDSS-BFH]
- ☐ CalAIM - Managed Care Plans
- ☐ California Department of Social Services (CDSS)
- ☐ California Emergency Solutions and Housing (CESH)
- ☐ California Tax Credit Allocation Committee (CTCAC)
- ☐ CalWORKS Housing Support Program [CA-CDSS-HSP]
- ☐ Community Colleges Homeless Housing [CA-CCCO-CCHHIP]
- ☐ Community Services Block Grant (CSBG)
- ☐ COVID-19 Emergency Homelessness Funding [CA-HCFC-COVID19]
- ☐ Encampment Resolution Funding (ERF) [CA-CALICH-ERF]
- ☐ Family Homelessness Challenge Grant (FHC) [CA-CALICH-FHC]
- ☐ Homeless Emergency Aid Program (HEAP) [CA-HCFC-HEAP]
- ☐ Homeless Housing Assistance & Prevention (HHAP) Round 1 [CA-HCFC-HHAP1]
- ☐ Homeless Housing Assistance & Prevention (HHAP) Round 2 [CA-HCFC-HHAP2]

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- ☐ Homeless Housing Assistance & Prevention (HHAP) Round 3 [CA-CALICH-HHAP3]
- ☐ Homeless Housing Assistance & Prevention (HHAP) Round 4 [CA-CALICH-HHAP4]
- ☐ Homekey Round 2 - Housing and Community Development (HCD) [CA-HCD-Homekey]
- ☐ HomeSafe [CA-CDSS-HomeSafe]
- ☐ Housing and Disability Income Advocacy [CA-CDSS-HDAP]
- ☐ Housing Choice Voucher (HCV)
- ☐ Housing for a Healthy California [CA-HCD-HHCII]
- ☐ Mental Health Services Act (MHSA)
- ☐ Multifamily Housing Program [CA-HCD-MHP]
- ☐ No Place Like Home Bonds (NPLH) [CA-HCD-NPLH]
- ☐ Private Funding
- ☐ Project Based Voucher (PBV) - Housing Choice Voucher (HCV)
- ☐ Shelter Plus Care (S + C)
- ☐ Veterans Housing and Homeless Prevention (VHHP) [CA-HCD-VHHP]
- ☐ Veterans Support to Self-Reliance (VSSR) [CA-CALVET-VSSR]
- ☐ Other City Funding
- ☐ Other County Funding
- ☐ NONE OF THESE
    - ☐ Please gather the funding source information for your program.

Program Demographics

Program Type (e.g. Emergency Shelter, Permanent Supportive Housing, etc.)*

- ☐ **Day Shelter:** A project that offers daytime facilities and services (no lodging) for persons who are homeless.
- ☐ **Emergency Shelter:** A project that offers temporary shelter (lodging) for the homeless in general or for specific populations of the homeless.
- ☐ **Homeless Prevention**: A project that offers services and/or financial assistance necessary to prevent a person from moving into an emergency shelter or place not meant for human habitation.
- ☐ **Housing Only:** A project that offers permanent housing for persons who are homeless but does not make supportive services available as part of the project.
- ☐ **Housing with Services (NO Disability Required):** A project that offers permanent housing and supportive services to assist homeless persons to live independently but does not limit eligibility to persons with a disability.
- ☐ **Permanent Supportive Housing (Disability Required):** A project that offers permanent housing and supportive services to assist homeless persons with a disability to live independently.
- ☐ **Rapid Re-Housing:** A permanent housing project that provides housing relocation and stabilization services and short-and/or medium-term rental assistance as necessary to help a homeless individual or family move as quickly as possible into permanent housing and achieve stability in that housing.
- ☐ **Street Outreach:** A project that offers services necessary to reach out to unsheltered homeless people, connect them

HMIS Resource Appendix

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with emergency shelter, housing, or critical services, and provide urgent, non-facility-based care to unsheltered homeless people who are unwilling or unable to access emergency shelter, housing, or an appropriate health facility.

☐ **Supportive Services Only:** A project that offers only stand-alone supportive services (other than Street Outreach) to address the special needs of participants (such as childcare, employment assistance, and transportation services) and has associated housing outcomes.

☐ **Transitional Housing:** A project that provides temporary lodging and is designed to facilitate the movement of homeless individuals and families into permanent housing within a specified period of time, but no longer than 24 months.

*Please indicate on your program request form if you either do not see a program type that aligns with the following options or if your program matches more than one of the Project Types.