



**California
Interagency Council
on Homelessness**

AB 977 HMIS Training for Homekey+ Grantees 5/13/2026



Agenda

1. **Welcome and Introductions**
2. **AB 977 Overview**
3. **Key Partners**
4. **HMIS Project Setup Overview**
 - Project Information
 - Funding Sources
 - Bed and Unit Inventory
5. **Entering Client Data**
6. **Next Steps**
7. **Resources & Questions**

California Interagency Council on Homelessness (Cal ICH)

Cal ICH is a statewide facilitator, coordinator, and leader for policy development and research for the state and local jurisdictions in their work to prevent and end homelessness in California.



Coordination and
Relationship Building



Policy
Development



**Data and
Research**



Technical
Assistance

AB 977 Overview

Assembly Bill 977 (AB 977) Overview

What is AB 977?

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

What is HMIS?

- A local information system used to collect data on housing and services provided to people experiencing or at risk of homelessness

Why AB 977 Matters

- Provides a more complete picture of people served
- Tracks service outcomes
- Supports better-informed policy decisions

Learn More

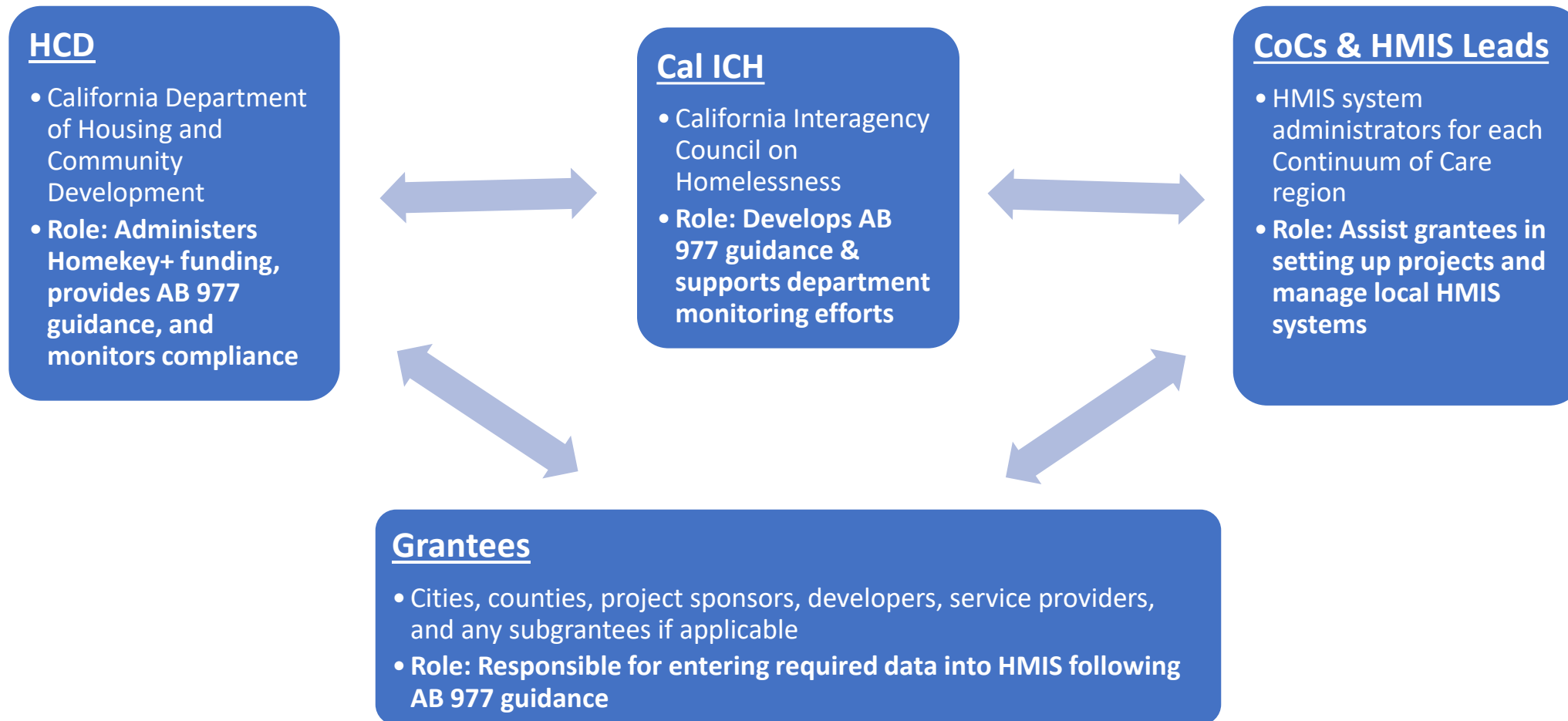
Additional information is available on the Cal ICH AB 977 webpage: <https://www.bcsb.ca.gov/calich/ab977.html>

AB 977 Grantee Exclusions

- **Tribal Grantees:** HCD is not requiring participation of tribal grantees. Technical assistance is available for tribal grantees who opt to report in HMIS.
- **Victim Service Providers (VSPs):** VSPs are prohibited under the Violence Against Women Act (VAWA) from entering client data into an HMIS and thus excluded from AB 977 requirements.
 - A VSP is an organization primarily focused on providing direct services to victims of domestic violence, dating violence, sexual assault, or stalking.

Key Partners & Roles in AB 977 Implementation

Key Partners in AB 977 Implementation



HMIS Roles: Grantees

The **Grantee** is the entity that holds the contract with HCD to receive funds and provide services.

Grantee Responsibilities

- Entering required data into HMIS
- Following data entry guidance set forth by Cal ICH and provided to the grantee by HCD

Delegating Data Entry

Grantees may delegate HMIS data entry to another entity, such as:

- Subgrantees
- Contracted service providers

The grantee remains responsible for compliance regardless of any delegation.

HMIS Roles: CoCs & HMIS Leads

A **Continuum of Care (CoC)** is a regional or local planning body that coordinates housing and services for individuals and families experiencing homelessness.

CoC responsibilities include:

- Designating the HMIS Lead agency
- Establishing CoC-wide HMIS policies
- Setting expectations for timely data entry

A CoC's **HMIS Lead** is the organization designated by the CoC to manage the HMIS system.

HMIS Lead responsibilities include:

- Contracts with HMIS software vendor
- Provides licenses and training to HMIS users
- Sets up HMIS projects and enters some project information
- Uploads HMIS data quarterly to the statewide data system (HDIS)



Grantees should identify and connect with their HMIS Leads at least 90 days before services begin.

Grantees needing assistance with this step can refer to list previously shared by HCD or contact HCD.

HMIS Roles: HCD & Cal ICH

California Department of Housing and Community Development (HCD)

As the administering department, HCD supports AB 977 compliance among grantees by:

- Communicating data entry requirements
- Providing technical guidance to grantees
- Monitoring data entry and program compliance

California Interagency Council on Homelessness (Cal ICH)

Cal ICH supports compliance efforts by:

- Specifying the format of data entry
- Developing guidance materials
- Receiving and maintaining HMIS data from CoCs
- Providing technical assistance & data reporting to departments and HMIS Leads

HMIS Project Setup Overview

Project Setup: Overview

Setting Up Your HMIS Project

Grantees will work with their HMIS Leads to set up projects and enter project-level information before entering client data in HMIS.

HMIS Training

HMIS Leads provide – and may require – training for HMIS users before data entry begins.

This ensures users understand:

- HMIS data entry requirements
- Local Continuum of Care (CoC) specific templates

Key Elements for Project Setup

- **HMIS Project:** A distinct unit of an organization that provides services, as set up in HMIS.
- **Project Type:** Each HMIS project has one project type based on the project's activities, type of housing, and the population served.
- **Other Funder Codes and Grant Identifiers (Grant IDs):** Codes assigned by administering departments to identify unique funding recipients; must be entered into the Funding Program fields in HMIS.
 - Projects can have more than one funding program and/or Grant ID.
 - More than one project can have the same Grant ID (when one grantee sets up multiple projects).

Project Descriptor Data Elements

When is Project Setup Complete?

Project setup in HMIS is considered complete when all Project Descriptor Data Elements (PDDEs) are entered for the project.

Key PDDE Categories

This training focuses on the bolded subcategories of elements:

- Organization Information
- **Project Information**
- Continuum of Care Location Information
- **Funding Sources**
- **Bed and Unit Inventory**

Project Descriptor Data Elements

Project Information

Understanding the project-level information required when setting up an HMIS project.

Project Descriptor Data Elements

Project Information

Required Project Information Fields

The following project-level data elements must be entered when setting up a project in HMIS:

- **Project Name**
- **Project Type**
- **Operating Start Date**
- **Operating End Date**
- **Continuum Project**

Project Descriptor Data Elements: Project Information

Operating Start and End Dates

Operating Start Date: this is the date the project first began providing services and/or housing.

- This should match the date the first client was served in the project
- The date may be in the future if the project has not yet started serving clients
- Enter the date the project began serving clients even if it is earlier than the Homekey+ funding start date

Operating End Date: this is the date the project stops providing services and/or housing.

- Leave this field blank while the project is active

Project Descriptor Data Elements: Project Information

Operating Start and End Dates - Example

Active Project (still serving clients)

Operating Start Date:

1/1/2024

Operating End Date:

BLANK

Closed Project (No longer serving clients)

Operating Start Date:

1/1/2024

Operating End Date:

6/1/2024

Project Descriptor Data Elements: Project Information

Continuum Project & Project Type

All Homekey+ projects will have the same response for these fields.

When setting up a Homekey+ project in HMIS, enter:

- Continuum Project: **Yes**
- Project Type: **Permanent Supportive Housing (PSH)**

Reason:

- Under the Homekey+ Notice of Funding Availability (NOFA), the program exclusively funds Permanent Supportive Housing (PSH).
- Under HUD definitions, all PSH projects are considered Continuum Projects.

Project Descriptor Data Elements: Project Information

Example: Project Type Conversion

If a grantee is operating **Transitional Housing (TH)** units and is using the Homekey+ funding to convert those TH units into **Permanent Supportive Housing** units, the **TH** and **PSH** activities will be entered into HMIS as two separate projects:

- A **new project** must be created with its project type field entered **as Permanent Supportive Housing (PSH)**.
 - The original project should be **closed with an operating end date** once all units have been converted to PSH (i.e. once it is no longer serving anyone).
 - Add an Operating End Date
 - Add a Grant End Date* on or before the Operating End Date
 - Add a Project Exit Date* for all clients on or before the Operating End Date
- * These date fields will be covered in detail later in the presentation*

Project Descriptor Data Elements: Project Information

Example: Project Type Conversion & Operating Dates

Closed Project (**Transitional Housing**)



Operating Start Date:
First day serving clients

Operating End Date:
Last day serving clients

Active Project (**new HK+ PSH project**)



Operating Start Date:
First day serving clients

Operating End Date:
BLANK

Project Descriptor Data Elements

Funding Sources

Understanding how to enter funding sources and grant identifiers in HMIS.

Project Descriptor Data Elements

Funding Sources

When setting up a project in HMIS, the following funding information must be entered:

- **Funding Source & Other Funder Code**
- **Grant Identifier (Grant ID)**
- **Grant Start Date**
- **Grant End Date**

These fields are critical for identifying projects within the state's data system and ensuring complete reporting on client outcomes.

Project Descriptor Data Elements: Funding Sources

Other Funder Code

The Funding Source field and the Other Funder Code identify which state programs funds the project. *Note: Multiple Other Funder Codes should be entered for a single project if the project receives funding from more than one program.*

2.06.1: Select “Local or Other Funding Source”

2.06.1A: Enter or select the Other Funder Code for Homekey+: **CA-HCD-HomekeyPlus**

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-HCD-HomekeyPlus

Project Descriptor Data Elements: Funding Sources

Grant ID, Grant Start Date, and Grant End Date

2.06.2: Grant ID is the project's HCD contract number plus a county code (see Project Setup Instructions for a list of county codes and Grant ID format).

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	
2nd funding source ★	09/20/2021	(not set)	0.00	0.00	09/20/2021	

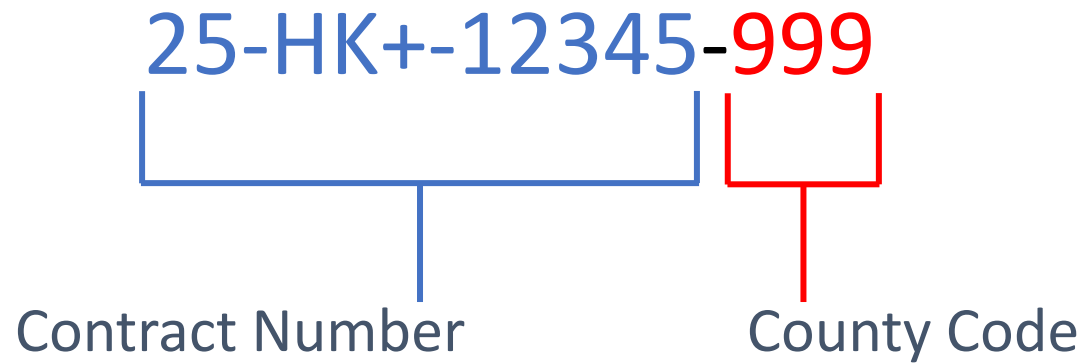
2.06.3: Grant Start Date is when the grant/contract started funding the project

2.06.4: Grant End Date is when the grant/contract stopped funding the project; this can be left blank until that grant is no longer funding the project

Project Descriptor Data Elements: Funding Sources

Grant ID Example

Grant ID = HCD contract number + “-” + County code



Project Descriptor Data Elements: Funding Sources

Example 1: Multiple Funding Sources

For projects that receive funding from multiple state programs and/or contracts, a separate funding source record must be entered into HMIS for each funding program or contract.

Example: A Permanent Supportive Housing project received both a **Homekey+** grant and a **Homekey** grant. Both grants began on July 1 and are still active at the time of data entry.

In HMIS, two funding source records should be entered. Example fields are shown below:

HMIS Field	Homekey+ Funding Source Record	Homekey Funding Source Record
Other Funder Code	CA-HCD-HomekeyPlus	CA-HCD-Homekey
Grant ID	25-HK+-12345-999	20-HK-12345-999
Grant Start Date	July 1	July 1
Grant End Date	BLANK	BLANK

Example 2: Project Type Conversion with Multiple Funding Sources

Project type conversion with multiple funding sources –

Example: A grantee received a **Homekey grant** to operate a **Transitional Housing (TH)** project. Later, the grantee received a **Homekey+ grant** to convert the housing units **to Permanent Supportive Housing (PSH)**. The project continues to use funds from both grants in the **PSH project** at the time of data entry.

In **HMIS**, there should be one funding source record for the original TH project (now closed with a Grant End Date) and two funding source records for the new PSH project. Example fields below:

HMIS Field	Original TH Project HK Funding Source Record	New PSH Project HK Funding Source Record	New PSH Project HK+ Funding Source Record
Other Funder Code	CA-HCD-Homekey	CA-HCD-Homekey	CA-HCD-HomekeyPlus
Grant ID	24-HK-56789-999	24-HK-56789-999	25-HK+-12345-999
Grant Start Date	First Day Receiving Funds	On Operating Start Date	On Operating Start Date
Grant End Date	On Operating End Date	BLANK	BLANK

Project Descriptor Data Elements: Project Information

Example 2: Project Type Conversion with Multiple Funding Sources

Closed Project (**Transitional Housing**)



Homekey Funding Record

Grant End Date:
Same as **TH** Operating
End Date

Active Project (**new PSH project**)



Homekey Funding Record

Homekey+ Funding Record

Grant Start Dates:
Same as **PSH** Operating
Start Date

Grant End Dates:
BLANK

BREAK
We will continue in 5 minutes

Project Descriptor Data Elements

Bed and Unit Inventory

Understanding how to record bed and unit inventory for housing projects in HMIS.

Project Descriptor Data Elements

Bed and Unit Inventory

Bed and Unit Inventory data elements capture a project's housing capacity available on a typical night:

- Total Units
- Total Beds
- Dedicated Beds (for indicated subpopulations)





Project Descriptor Data Elements: Bed and Unit Inventory

Defining "Beds" and "Units"

 **Bed** = capacity to serve one person

 **Unit** = capacity to serve one household

A household can consist of one or more people living together. Examples of a household:

-  one parent and one child
-  two adults
-  one single individual
-  any combination of household members

A unit can consist of one or more beds.



Project Descriptor Data Elements: Bed and Unit Inventory

Reporting Total Beds and Units

- Some projects have a fixed number of beds and units, while others only have a fixed number of units (for example, family housing with varying household sizes).
- Projects should report bed and unit numbers as shown below:

Unit/Bed Scenario	How To Report Inventory
Fixed number of units and beds	Report the fixed number of units and beds
Fixed number of units but not beds	Report fixed number of units and estimate the number of beds based on the average household size served (e.g., a project with 30 family units and an average family size of 3 would record 90 beds).

Project Descriptor Data Elements: Bed and Unit Inventory

Dedicated Bed Inventory

A **dedicated bed** must be filled by a person from a specific **subpopulation** (unless no one from that group qualifies for the project in the geographic area).

Subpopulations for which projects must report dedicated beds:

- Veterans
- Youth (under 25 years old)
- People Experiencing Chronic Homelessness
- Combination of these groups

Household Rule: If one member of a household qualifies for the subpopulation, all beds used by that household are counted as dedicated beds.

Project Descriptor Data Elements: Bed and Unit Inventory

How to Report Inventory

After determining the inventory of total units, total beds, and dedicated beds, grantees will enter these amounts into HMIS separated by the categories below:

Household Type	Population Categories (for dedicated beds)
<ul style="list-style-type: none">• Adults with children• Adults without children• Child only	<ul style="list-style-type: none">• Chronically homeless veterans• Youth veterans• Any other veterans• Chronically homeless youth• Any other youth• Any other chronically homeless

Project Descriptor Data Elements: Bed and Unit Inventory

How to Report Inventory: Example

A project provides housing limited to veterans and their families. There are a fixed number of apartments (10).

It requires at least 4 of its units to serve chronically homeless (CH) veterans.

- Of the 4 units that serve CH veterans, all apartments served veterans who were single with no children
- The other 6 units serve other veterans who are single with one child (average household size of 2).

Inventory would be entered as:

Enter beds and units for each household type (based on average or typical clients served)	Adults with Children	Adults without Children	Child only
Total Units	6	4	0
Total Beds	12	4	0
Dedicated Beds: Chronically homeless (CH) veterans	0	4	0
Dedicated Beds: Any other veterans	12	0	0

Entering Client Data

Overview of how client information should be entered into HMIS.

Client-Level Data Elements

- Once a project is set up in HMIS, grantees can begin entering client data.
- AB 977 requires entry of Client-level data elements in two categories:
 - Universal Data Elements (UDEs)
 - Common Data Elements (CDEs)
- These data elements may be collected at different points in time and may vary depending on the project type or population served.

Client-Level Data Elements: Examples

- Examples of data element collection requirements that vary by population and project type, as relevant to Homekey+:
 - **Veteran Status** is required for all **adults** (not children) in all project types.
 - **Housing Move-in Date** is required for **heads of households** in **permanent housing projects**.
 - **Current Living Situation** is **not required** for permanent housing projects.

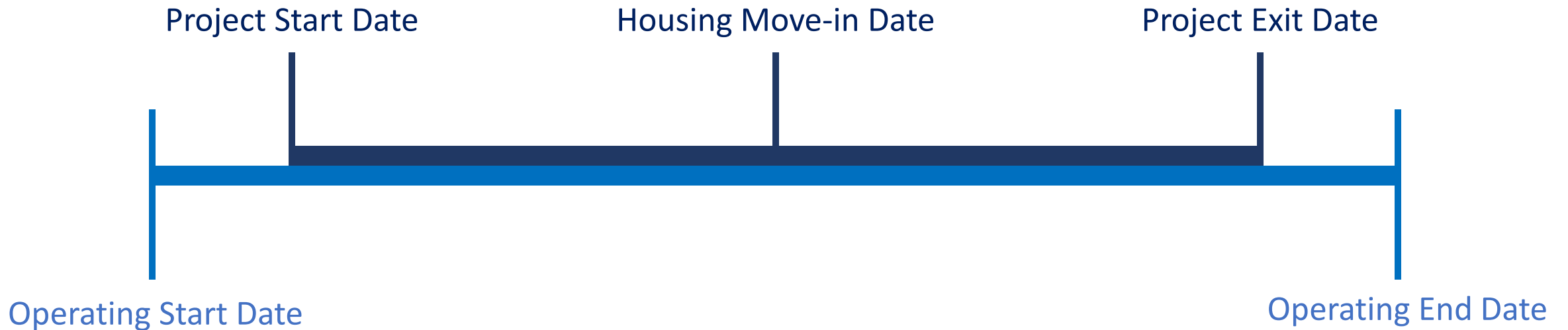
For a full list of all client-level data elements and their various requirements, please refer to the AB 977 HMIS Project Setup Instructions (Appendix B) or the HMIS Data Standards Manual.

Client-Level Data Elements: Key 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.
- **Project Exit Date:** The date the client exited from the project and/or ceased receiving services from the project.
- **All client dates must be on or within the project's operating dates (illustrated on next slide).**

Client Dates and Project Dates

Client Dates: Duration a Client is Served by the Project
(Client-Level Data Elements)



Project Dates: Duration of Project Operations
(Project-Level Data Elements)

Project and Client Dates: Example

Consider a client within the scenario from the project type conversion example (Slide 29).

- A county receives Homekey funding to operate a Transitional Housing (TH) project and begins serving clients on **January 1**.
- A client moves into a transitional housing unit on **May 1**.
- The county receives a new Homekey+ grant to convert the project to Permanent Supportive Housing (PSH) and begins converting units to PSH and providing new services on **July 1**. Clients remain in their housing placements as the new services begin.
- The client begins receiving the new services as their unit is converted on **September 1**.
- By **November 1**, all units of the original project have been converted to PSH, and TH services cease.
- At the time of data entry, the PSH project is ongoing, and the client remains in their placement.

In **HMIS**, the original project should be closed (operating end date and client project exit dates added), and a new project should be added, with a record for the client in each project. Date fields should be entered as:

HMIS Field	Original HK TH Project	New HK+ PSH Project
Project's Operating Start Date	January 1	July 1
Client's Project Start Date	May 1	September 1
Client's Housing Move-In Date	NOT COLLECTED*	September 1*
Client's Project Exit Date	September 1	BLANK
Project's Operating End Date	November 1	BLANK

**Client's Housing Move-in Date:*

Even though the client moved into the unit in May, TH projects do not collect the move-in date field. As the client's unit transitioned to PSH in September while the client was already living there, the move-in date is entered as the same date in September.

Next Steps

Next Steps: Connecting with HMIS Leads

At least 90 days before operations begin, grantees should contact their HMIS Leads to begin project setup:

Process

1. Grantee shares project information with the HMIS Lead
2. HMIS Lead provides grantee access to HMIS software
3. HMIS Lead assists grantee with initial project setup

Result

Once these steps are completed, the grantee can begin entering client data in HMIS when services begin.

AB 977 Resources

- [AB 977 HMIS Project Setup Instructions](#)
- [AB 977 Frequently Asked Questions for Grantees](#)
- [HMIS 101: Demystifying HMIS](#)
- [Trauma-Informed Data Collection Training](#)
- [HMIS Data Quality: Best Practices](#)

For all AB 977 data entry questions, grantees can reach out to HCD at ab977amc@hcd.ca.gov or their HMIS Lead.

Questions?