

PROJECT SETUP

QUICK FACT OVERVIEW



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WHAT

A project is a “distinct unit of an organization as set up in the HMIS” (HMIS Data Standards, 2020). A project distinguishes between project types and funders. Each project has one designated project type. The start date should reflect the date your agency began/plans to begin to service clients from this project. The project should be set up prior to funding start date if possible. When this is not possible, project start dates can be back dated.

HOW

Fill out the Project Setup form found here: [HMIS Website > Resources > Request Forms > Project Setup](#)

WHO



Anyone within the agency may request a project be set up. HMIS recommends the requestor has HMIS access so they are familiar with the terms and have context for questions that may arise. All requests must be authorized by a Project Manager/Director, Agency HMIS Representative, or any of their supervisors.

RESOURCES

The following resources are available to help answer questions when filling out your Project Setup Form (*not all options are applicable to every project*):

- Contract between your agency & the funder
- Any ongoing Memorandum of Understandings
- Project Type Key
- HMIS Data Standards Manual
- HMIS Program Manual
- Agency Guidelines
- HMIS Team

PROCESS

- 1 A Project Setup Form is submitted by the agency, automatically creating a ticket for the request. Expect 2 weeks for completion.
- 2 The ticket is assigned to an HMIS employee to create the project.
- 3 HMIS will contact Agency through the open ticket to clarify any needed questions, answer any questions and to give updates.
- 4 Project setup complete: Agency is notified through the ticket and Agency may begin enrolling clients.