



Osnium Instruction Guide:

HUD Projects and the TDHCA ESG Monthly Performance Report

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This guide will help you in reporting to the Texas Department of Housing and Community Affairs (TDHCA) for their state Emergency Solutions Grant (ESG) report. Keep in mind you will also need to run CAPER reports periodically and Osnium supports resources in that area. At any point if guidance from TDHCA differs from this report, please utilize TDHCA’s guidance. Should you have direct questions please contact your TDHCA contact. For more information about reporting to the TDHCA, please visit their website [here](#).

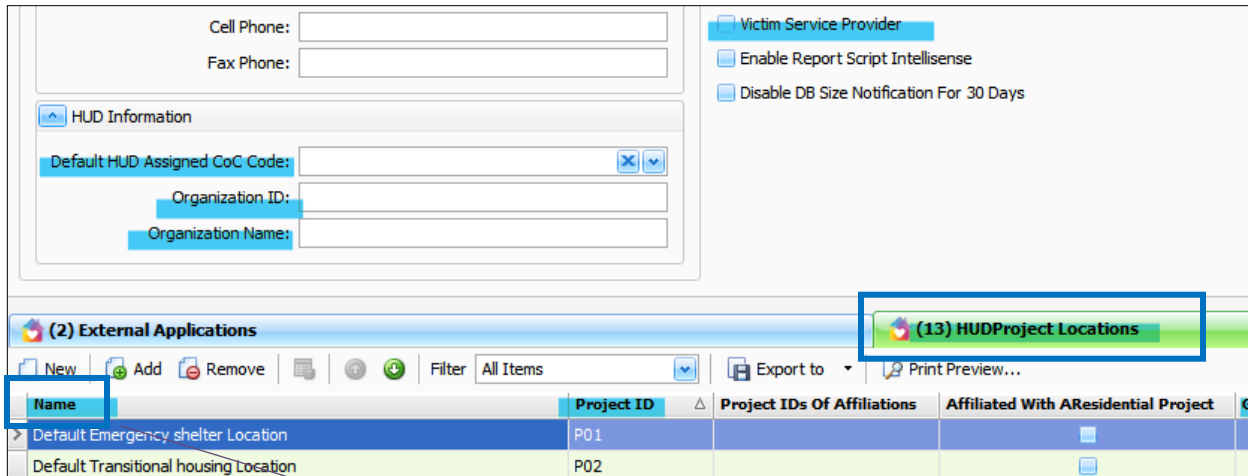
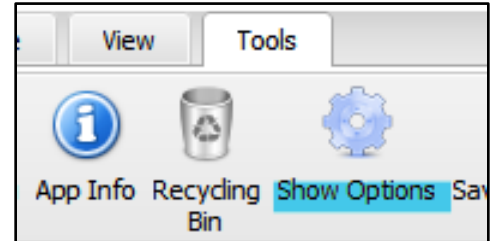
Important Note: HUD often asks for more information to be reported than what Family Violence Programs can or should report, including personally identifying information. Be sure to clean up data to not identify clients within your community. A good rule of thumb is if there are under 10 clients in the report, make sure to review data to make sure it is not identifying. If you have specific questions, please don’t hesitate to reach out to TCFV at datatx@tcfv.org.

Keep in mind that ESG funds, regardless of the distributor, originate with U.S. Department of Housing and Urban Development (HUD). For information on specific data elements, you can view the HUD HMIS Data Standards [here](#).

Setting up your HUD Projects and Locations

In order to get started, you must set up HUD project locations to accurately report for your [ESG Monthly Performance Report](#) (MPR) required by TDHCA, as well as your annual CAPER. Start by clicking on Tools > Show Options.

Highlighted fields are important to fill out, if you have the information. To add a new HUD project location, click on the HUD project location tab, and click New.



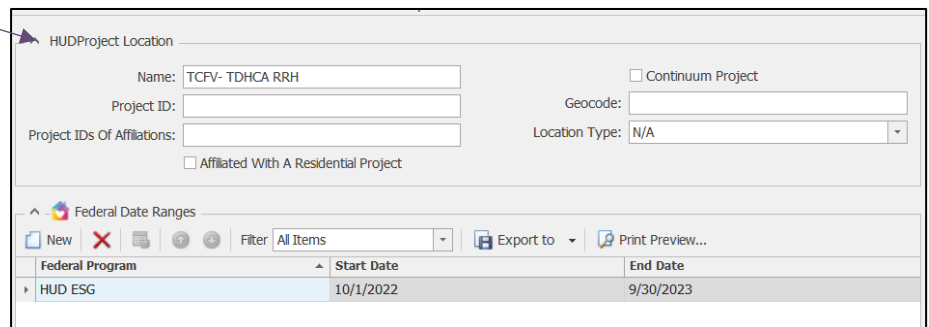
The screenshot shows the HUD Information form with the following fields highlighted in blue:

- Cell Phone: []
- Fax Phone: []
- Victim Service Provider:
- Enable Report Script Intellisense:
- Disable DB Size Notification For 30 Days:
- Default HUD Assigned CoC Code: []
- Organization ID: []
- Organization Name: []

Below the form is a table of HUDProject Locations:

Name	Project ID	Project IDs Of Affiliations	Affiliated With A Residential Project
Default Emergency shelter Location	P01		<input type="checkbox"/>
Default Transitional housing Location	P02		<input type="checkbox"/>

You should have a project location for each Project Type you have HUD funding for, such as Emergency Shelter, Rapid Re-Housing, or Homelessness Prevention. If you have more than one project or ESG funding stream, make sure you create unique project IDs and project names for each. *We recommend you rename any "default location" project names.*



The screenshot shows the HUDProject Location form with the following fields highlighted in blue:

- Name: TCFV- TDHCA RRH
- Project ID: []
- Project IDs Of Affiliations: []
- Geocode: []
- Location Type: N/A
- Affiliated With A Residential Project:

Below the form is a table of Federal Date Ranges:

Federal Program	Start Date	End Date
HUD ESG	10/1/2022	9/30/2023

On the TDHCA ESG MPR, Project Types are called *Components*.

Quick Tips

- You can reach out to Osnum support at support@osnum.com to assist you in setting up your project locations.
- The organization ID is your Osnum Site ID.
- You may choose any unique Project ID and Project name for your agency. Find your geocode [here](#).
- Make sure to click the check box indicating you are a Victim Service Provider.
- Find more information on updating this section at: <https://www.osnum.com/hud/>

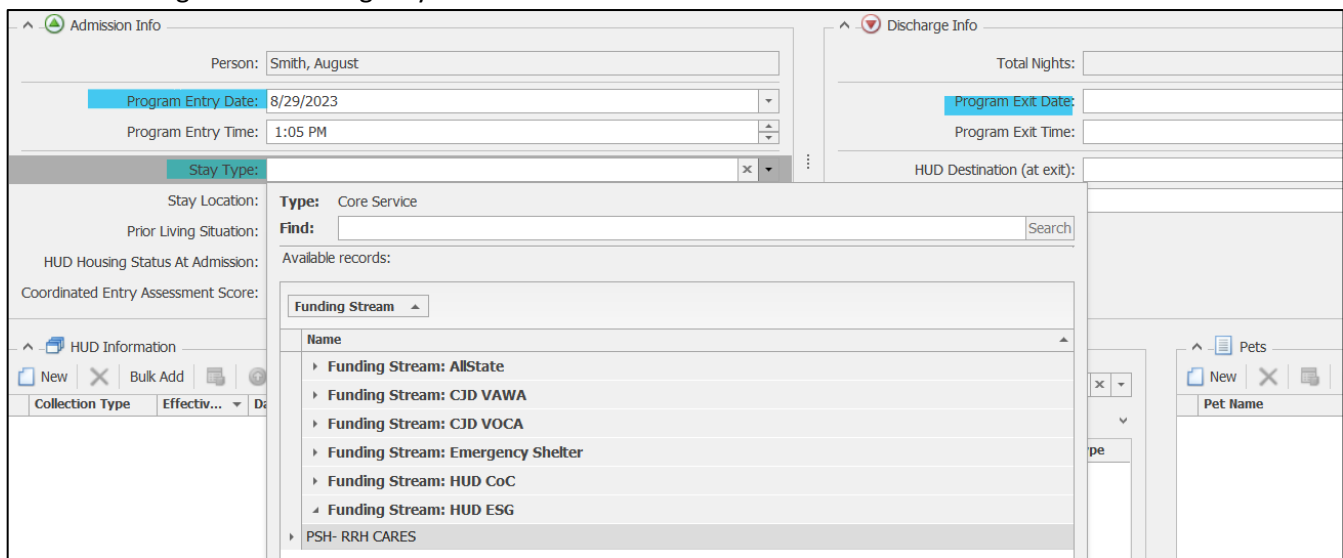
Client Stays Tab

Most of the information for this report will pull from the Stays tab for each client. On the Stays tab, click New, to enter a new stay. You will create a new stay each time the client enters a new project (Emergency Shelter, Homelessness Prevention, Rapid Re-Housing, etc.), including if they are participating in two project types at the same time. When entering a new stay entry, make sure to fill out the top part of the Stays tab. Important fields to fill out in an entry are highlighted.



Program Entry Date	Program Exit Date	Funder	Shelter Type	Referral Source
1/13/2020			Homelessness Prevention	
1/13/2020			Emergency Shelter	

Under Stay Type, make sure you choose the funding stream and program that the client will be entering. You may need to add a new program/project type under a funding stream. If clients are entering Emergency Shelter, select Funding Stream: Emergency Shelter.



Admission Info

Person: Smith, August

Program Entry Date: 8/29/2023

Program Entry Time: 1:05 PM

Stay Type:

Stay Location:

Prior Living Situation:

HUD Housing Status At Admission:

Coordinated Entry Assessment Score:

Discharge Info

Total Nights:

Program Exit Date:

Program Exit Time:

HUD Destination (at exit):

Funding Stream

- Funding Stream: AllState
- Funding Stream: CJD VAWA
- Funding Stream: CJD VOCA
- Funding Stream: Emergency Shelter
- Funding Stream: HUD CoC
- Funding Stream: HUD ESG
- PSH-RRH CARES

Important Note: The Program Entry and Exit Dates are the fields that pull in to count “Provided Bed Nights” on the ESG MPR. TDHCA asks for all provided bed nights *regardless of funder*, so all clients should have a Project Entry and Exit entered in this section to pull accurate data into the ESG MPR.

Quick Tips

- The Coordinated Entry Assessment Score is a box to include your entry assessment score of survivors. This is often the VI-SPDAT or Family VI-SPDAT, but can be an assessment used within your area.
- Some programs with multiple type of funding sources for shelter can utilize the Stays tab to get an accurate picture of clients in shelter. Note that if you choose to track all client stays in the stays tab, ***HHSC Shelter entries and exits will have to be also be entered in the client services tab.***
- You can enter clients that do not stay overnight by entering and exiting the client on the same day, and entering Program Entry Time and Exit Time on the Stays tab.

Entering HUD Information

Project Entry: Once you have filled out the top Stays section, click New > Project Entry.

The screenshot shows a 'HUDParameters' dialog box. At the top, it says 'Staff: Breall Baccus'. Below that, there are two main fields: 'Collection Type:' with the value 'Project entry' and 'Effective Date:' with the value '2/28/2020'. In the background, a 'HUD Information' window is partially visible with a 'New' button highlighted.

Important Note: You should create a new project entry for every client receiving services under ESG Funding. Once you choose the Client Location field, which is the type of ESG Project the client is entering, your specific Project Locations you created under Program Options will auto populate under Project Location. If a client receives essential services, but does not have a Project Entry, that client information will not pull into the ESG MPR report. Osnum has a Project Location of “Emergency Shelter- Services Only” to pull in client information but will not be included in “Housed Overnight” or “Provided Bed Nights” in the ESG MPR.

The screenshot shows a form with the following fields: 'Federal Program:' with value 'HUD ESG', 'Client Location:' with value 'Emergency shelter', and 'Project Location:' with value 'Emergency Shelter - Services Only'. Below these, there is a table for 'Assigned CoC Code:' with a header 'Name' and one row containing 'Default Emergency shelter Location' and 'Emergency Shelter - Services Only'.

Quick Tip

- HUD guidance states that you must ask clients all required questions, but they are allowed to not answer. Please ensure this is communicated to survivors when collecting sensitive data.

A new project entry page will pull up the HUD information to be filled out for accurate reporting for the ESG MPR. HUD has what is called Universal Data Elements that are required to be filled out for all project types. To learn more about Universal Data Elements, review the HUD Data Standards [here](#).

The screenshot shows a comprehensive HUD client information form. It is divided into several sections: 'Project Details' (Person ID: 100162, Client Location: Missing, Project Location: [blank], HUD Assigned CoC Code: TX-000), 'Demographics' (First Name: August, Middle Name: [blank], Last Name: Smith, Suffix: [blank], Name Type: Full name reported, SSN: [blank], SSN Type: Missing, Date of Birth: 1/1/1976, Date of Birth Type: Full DOB Reported, Race: White, Multiple Race Selection: N/A, Ethnicity: Missing, Genders: Female, Relationship To Head Of Household: Missing, Residential Move In Date In Permanent Housing: [blank], Date of Engagement: [blank]), 'Prior Living Situation' (Type of Residence: Missing, Length of Stay Prior to Living Situation: Missing, Approximate Date Homelessness Started: [blank], Number Of Times Homeless in the last three years: Missing, Number Of Months Homeless: Missing), 'Domestic Violence' (Domestic violence victim/survivor: Missing, When did DV experience occur: Missing, Are You Currently Fleeing: Missing), 'Veteran's Status' (Veteran Status: Missing), and 'Contact' (Date Of Contact: [blank]).

Quick Tips

- Some of the fields on this page pull over from the Main Client Record, and some do not. Please review your data to make sure fields pulled over all information correctly.
- HUD now allows for more than one race to be reported for clients. Ensure if needed, you updated client’s race/ethnicity information to ensure all races are reported accurately.
- All clients should have “yes” selected for the Domestic Violence Victim/Survivor field, so that the client pulls into the relevant special population box on the ESG MPR.

Important Note: If a Head of Household has children, make sure to create secondary profiles for the children first. The Project Entry will duplicate over to the children when you create the stay for the Head of Household to ease some of the reporting. *You still need to go back into the child profile to finish filling out the questions in their Project Entry to pull into the ESG MPR.*

Special Populations: You will find the other special population information under the Health Information tab:

Important Note: While it is always important to double check your data, it is especially important to not report personally identifying information of special populations. If a special population has **less than 10 clients** included, or less in some circumstances, we suggest you refrain from reporting that information as it can easily identify members of your community.

Quick Tips

- For a client to be considered to have a Chronic Substance Abuse or Severe Mental Illness, you must click yes to both the disability and yes that the disability “Impairs Ability to Live Independently”.
- On the ESG MPR, the “Persons in at least one special population” box is an unduplicated number of clients. A client may be counted in more than one special population, but will only show up once in this box.

Income Increase and Non-Cash Benefits Increase: You will fill out income related data at project entry and exit, but it will not be reported in the MPR until exit. If the income or Non-Cash Benefit entered at Project Exit is higher than at Project Entry, the client will be counted in the MPR.

Receiving	Monthly Amount
Earned Income: Yes	\$500.00
Unemployment Insurance: No	\$0.00
Supplemental Security Income (SSI): No	\$0.00
Social Security Disability Income (SSDI): No	\$0.00
VA service-connected disability compensation: No	\$0.00
VA non-service-connected disability pension: No	\$0.00
Private disability insurance: No	\$0.00
Worker's compensation: No	\$0.00
Temp. Assist. for Needy Families (TANF): No	\$0.00
General Assistance (GA): No	\$0.00
Receiving Retirement Income From SS: No	\$0.00
Pension or Retirement Income from a Former Job: No	\$0.00
Child Support: No	\$0.00
Alimony or Other Spousal Support: No	\$0.00
Other Source: No	\$0.00
Total:	\$500.00

Receiving Non-Cash Benefits	Coverage in Effect
Supplemental Nutrition Assist. Program (SNAP): No	Missing
Special Supplemental Nutrition Program (WIC): No	Missing
TANF child care services: No	Missing
TANF transportation services: No	Missing
Other TANF-funded services: No	Missing
Other source: No	Missing

Project Exit: When a client exits the project, make sure you are entering the Project Exit under the same stay as the Project Entry. Click the Stays Entry for the project. Fill out the top of the Stays tab with Exit information, then click New> Project Exit.

The screenshot displays two overlapping forms. The top form, 'HUD Information', contains the following fields: Person (Rose, Moira), Shelter Type (Emergency Shelter), Coordinated Entry Assessment Score (0.00), Referral Source, Funder (ESG), Prior Living Situation (Place not meant for habitation), HUD Housing Status At Admission (Literally homeless), HUD Destination (at exit) (Transitional housing for homeless persons), and Housing Status At Discharge (Stably housed). The right side of the form shows Program Entry Date (10/1/2019), Program Entry Time (11:28 AM), Program Exit Date (12/9/2019), and Program Exit Time (12:00 AM). The bottom form, 'HUDParameters', shows Collection Type (Project exit) and Effective Date (12/9/2019). A table below HUDParameters shows 'Project entry' with an effective date of 10/1/2019 11:28 AM. The 'Last Updated By' field is Breall Bacus.

HUD Destination at Exit: The report pulls clients identified as a person exiting to allowable exit destinations based on their project type. To view which allowable exit destinations are pulled into the report, please view the [Texas ESG MPR Guide, Appendix A](#).

Other Fields Collected in the ESG MPR Report

A few fields necessary for the Texas ESG MPR Report are collected outside of the Stays tab. This includes:

- **Rental Assistance:** Rental Assistance pulls from the Financial Assistance tab in the Client screen. The eligible rental assistance that pulls into the ESG MPR are highlighted below:

The screenshot shows the 'Financial Assistance' tab selected in a client screen. The toolbar includes 'New', 'Filter All Items', 'Export to', and 'Print Preview...'.

FA Type:	Name	Cash Value:
FA Date:	Driver's License	
	Emergency financial assistance/services	
	Emergency Funds	
	Emergency Shelter: Tenant Based Rental Assistance - Rental Assistance	
	Emergency Supplies	
	ESG - Homeless Prevention: Tenant Based Rental Assistance - Rental Assistance	
	ESG - Homeless Prevention: Tenant Based Rental Assistance - Rental Assistance in Arrears	
	ESG - Rapid Re-housing: Tenant Based Rental Assistance - Rental Assistance	
	ESG - Rapid Re-housing: Tenant Based Rental Assistance - Rental Assistance in Arrears	

Quick Tip

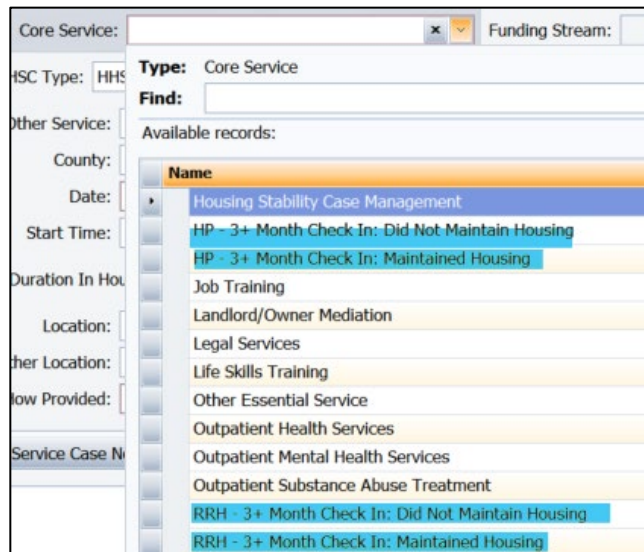
Eligible rental assistance is defined as:

- Short-term rental assistance for up to 3 months of rent.
- Medium-term rental assistance for more than 3 months but not more than 24 months of rent.

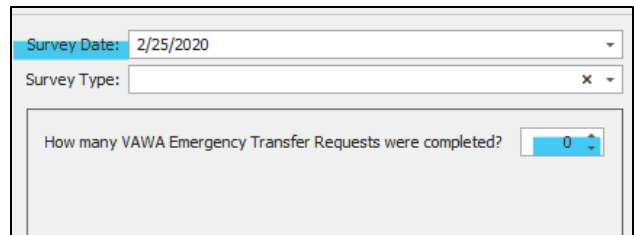
- **Maintained Housing for 3-plus Months:** Osnum has added a service called "3-month Check In: Maintained Housing" to the Services: ESG Dropdown on the Services tab. If you check in with a client 3-plus months after they have exited the project, and they maintained housing, you can enter this service. Any time this service is entered during the reporting period, it will be pulled into the appropriate field in the Texas ESG MPR Report. We have also added "3-month Check In: Did not Maintain Housing" as a service, as a way to track if you checked in with the client, and they had not maintained housing.

Quick Tip

- Checking in with a survivor after exiting ANY of your housing programs is a meaningful best practice to provide continued support to survivors' needs!



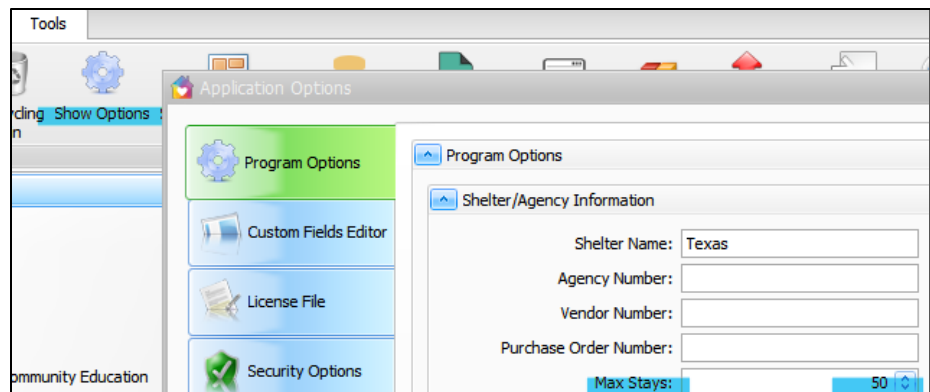
- **VAWA Emergency Transfer Requests:** This is an important request to document in order to show the need, but should not be connected to a client's name or information. Because of that, there is a new Survey created within Osnum to collect this data. This information will pull into the report when a Survey is created during the reporting period. If you need a copy of the created survey to import into your Osnum, please contact support@osnum.com. You can learn more about the VAWA Emergency Transfer Request [here](#) and view a model policy from Safe Housing Partnerships [here](#).
- **COVID19 and Winter Storm Waivers-** you will also find these waivers under the Core Services list under the ESG dropdown, similar to the Maintained Housing services above.



Fields Not Collected in Osnum

- **Emergency Shelter Rehabilitated Beds and Emergency Shelter Converted Beds:** These two elements of the report will also not be collected within Osnum. These are defined by HUD, and relate to new beds being put into service. If new beds are being put into service, you should make note of that outside of Osnum and add to your MPR separately.

Note: If you add new beds to service, that would require your program to update your "Max Stays" available in Osnum under Tools > Show Options.



Fields Not Reported in the New ESG MPR Report

- **Street Outreach:** It is uncommon that Family Violence Programs receive Street Outreach funding, so it has not been included within the ESG MPR Report. Please reach out if you have Street Outreach funding and need help pulling the required information for reporting purposes.

Importing the Monthly Performance Report (MPR)

The ESG MPR is a spreadsheet report. It must be imported in the Spreadsheet tab of the Reporting Dashboard. Please reach out to datatx@tcfv.org if you are looking for the most up to date version of this report.

Name	Version Date
ESG Monthly Performance Report	2/26/2020
VOCA Victimization	

Viewing Results in a Spreadsheet Report

A benefit of the spreadsheet report is that you can easily view what clients are pulling into the counts within the report. To do this, highlight the ESG report, and click Show Report Designer.

Name	Version Date	Description
ESG Monthly Performance Report	3/30/2023	Updated: March 30, 2023 - Updated Den
VOCA Report	5/6/2022	Updated: May 4, 2022 - Fixes to call victi

When you are running within the report designer, make sure to not change any formulas or save anything when you close out. This is a back end look at the report, so you want to be careful not to make any changes. If you think you've messed it up, reach out to TCFV or Osnum to get a corrected version.

Unduplicated ESG Entries			
Persons Entering		18	
Households Entering		13	
Unduplicated Gender		Unduplicated Age	
Male	5	Under 18	
Female	13	18-24	
er that is not			

The parameters are on the right side. You only need to fill out the global parameters and additional parameter of project Location if needed. Once you run the report, pick the count you are looking to review. Right click > View Results. Sometimes you must do this twice.

A pop up will show you which clients are being counted in that field. See an example of the 18 clients pulling into my MPR report:

Person Type	Client ID	First Name	Last Name
Household Member	100004	Josephine	Barry
Client	100002	Darcy	Barry
Household Member	100146	Ben	Bluebell
Client	100145	Bonnie	Bluebell
Household Member	100159	Becky	Canine
Client	100154	Yolanda	Cruz
Client	100120	Johanna	Doe
Household Member	100141	Tim	Doe
Client	100114	Jane	Does
Client	100149	young	guy
Client	100148	Joy	Holiday
Client	100137	Alyssa	Kisser

18

User: bbaccus