**tcfv**
TEXAS COUNCIL ON FAMILY VIOLENCE

## Osnium Instruction Guide:

### HUD Projects and the TDHCA ESG Monthly Performance Report

## Contents

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.
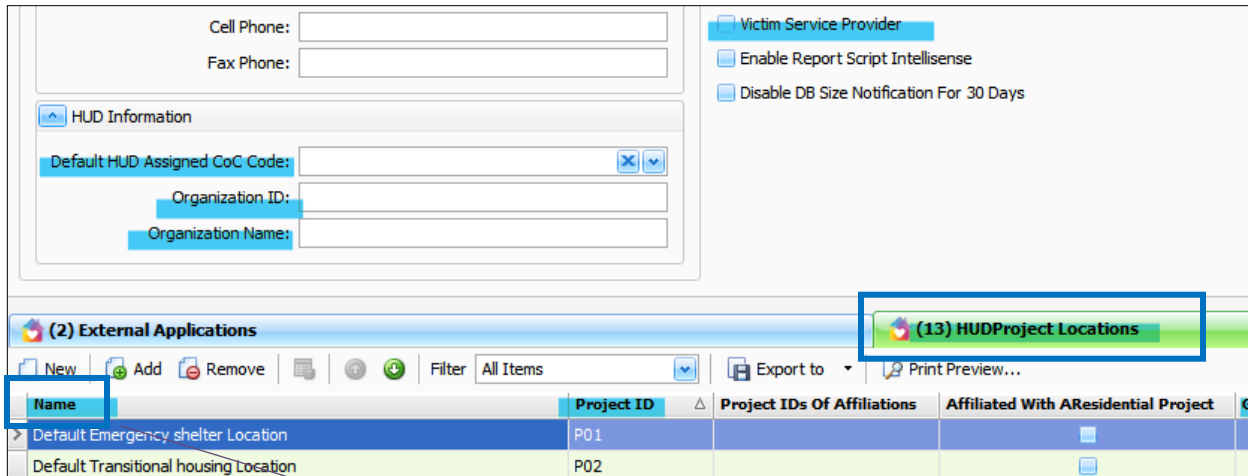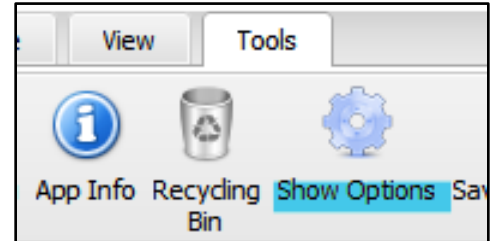
*Important Note:* HUD often asks for more information to be reported than what Family Violence Programs can or should report, including personally identifying information. Be sure to clean up data to not identify clients within your community. A good rule of thumb is if there are under 10 clients in 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 distributer, 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.
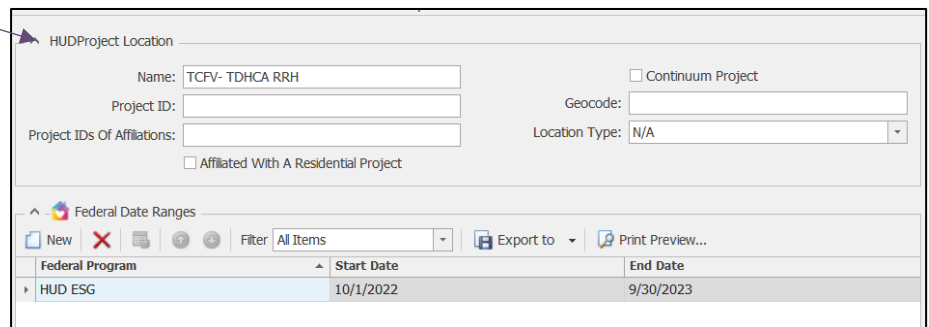




You should have a project location for each Project Type you have HUD funding for, such as Emergency Shelter, Rapid Re-Housing, or Homelessness Prevention. If you have more than one project or ESG funding stream, make sure you create unique project IDs and project names for each. *We recommend you rename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



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<u>Quick Tips</u>

- You can reach out to Osnium support at support@osnium.com to assist you in setting up your project locations.
- The organization ID is your Osnium 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.
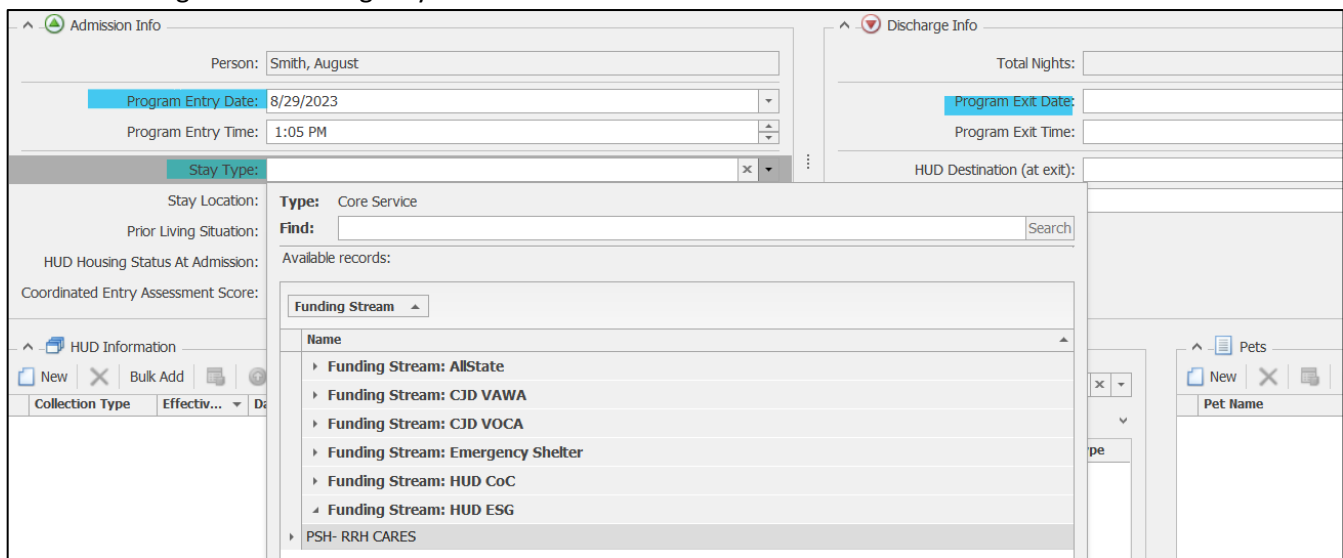- Find more information on updating this section at: https://www.osnium.com/hud/

## 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.



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.



*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.

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### 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.



*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. Osnium 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.



**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.



**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.

<div style="border:1px solid #000; background:#d9cce3; padding:10px;">

<p style="text-align:center;"><strong><u>Quick Tips</u></strong></p>

- 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.

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**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.

**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.



**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:



> **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:** Osnium 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.
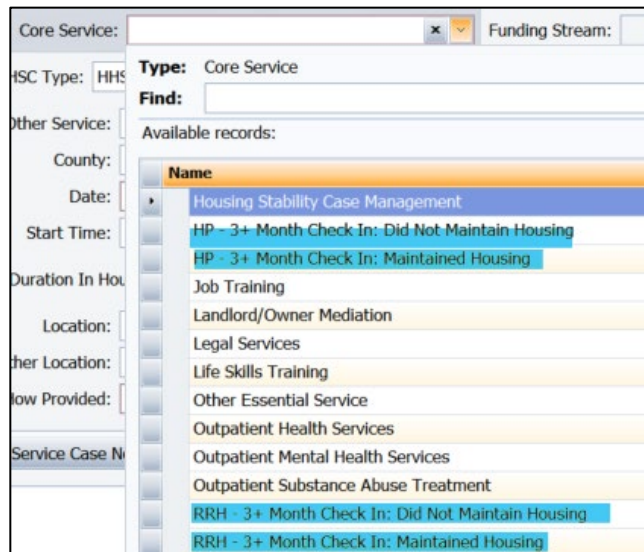
- **VAWA Emergency Transfer Requests:** This is an important request to document in order to show the need, but should not be connected to a client's name or information. Because of that, there is a new Survey created within Osnium to collect this data. This information will pull into the report when a Survey is created during the reporting period. If you need a copy of the created survey to import into your Osnium, please contact support@osnium.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.
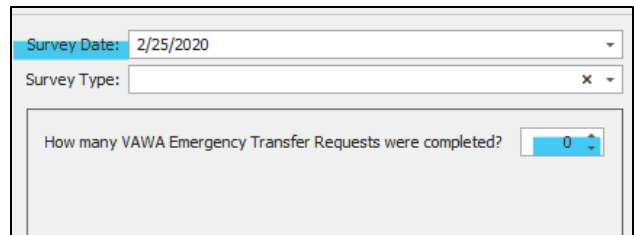
## Fields Not Collected in Osnium

- **Emergency Shelter Rehabilitated Beds and Emergency Shelter Converted Beds:** These two elements of the report will also not be collected within Osnium. 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 Osnium 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 Osnium under Tools > Show Options.
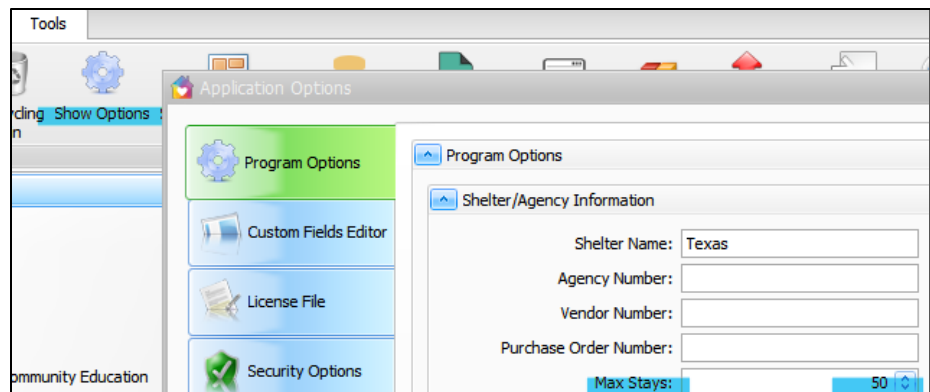
## Fields Not Reported in the New ESG MPR Report

- **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.



## 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.



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 Osnium to get a corrected version.



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: