



HOMELESS MANAGEMENT
INFORMATION SYSTEM (HMIS)
SOFTWARE VENDOR REQUEST
FOR PROPOSAL

Issued February 11, 2026
Proposals Due March 25, 2026 8:00PM EST



HMIS Lead Organization:
Advancing Connecticut Together

HMIS Lead Organization CEO:
John Merz
jmerz@act-ct.org

HMIS Director:
Jackie Gardner
jgardner@act-ct.org

Revised 2/27/26: Bullet 2 in Section 3b language corrected to read: Fully functional reporting with detailed sub-reporting for troubleshooting data issues for the following: CoC APR, Coordinated Entry APR, ESG CAPER, PATH Reporting, RHY Compliant Export, LSA Export, HIC/PIT Export, System Performance Measures with flexibility for analysis at a more granular level than just CoC level, and SSVF Export and Reporting

Table of Contents

1. Overview & Purpose of Project.....	2
Project Background.....	2
Broader HMIS Goals.....	2
2. About HMIS in CT.....	2
HMIS Leadership in CT.....	2
HMIS Administration.....	3
System Overview as of August 31, 2025.....	4
3. Scope of Minimum Software Requirements.....	5
3a. HUD/Federal Partner Data Collection & Reporting Compliance in Accordance with Data Standards and Technical Standards.....	5
3b. Real-time Reporting.....	5
3c. Mobile Technology.....	5
3d. Case Management.....	5
3e. Coordinated Entry.....	6
3f. Financial transaction management.....	6
3g. Data Entry.....	6
3h. User Management.....	7
3i. System Administration.....	7
3j. System Customization Support.....	7
3k. Data Security.....	7
3l. Customer Service & Support.....	8
3m. Database Servers.....	8
3n. Americans with Disabilities Act Compliance.....	8
Applicant Requirements/Documentation.....	9
4. Eligible Applicants.....	9
5. Capacity & Solvency.....	9
6. References.....	10
7. Proposal Content & Submission.....	10
8. Proposal Submission Information.....	11
Scoring.....	11
Q&A Session for Bidders.....	11
Appendix A-Existing Customizations in CT HMIS.....	12

1. Overview & Purpose of Project

The state of Connecticut is requesting proposals for a comprehensive Homeless Management Information System (HMIS) software solution that exceeds the minimum requirements set by the US Department of Housing and Urban Development (HUD). Connecticut previously requested proposals for an HMIS software and subsequently migrated to a new solution over ten years ago. In the last ten years, not only has technology advanced, but the approaches to preventing and ending homelessness have as well. Connecticut's Homeless Management System must be able to meet the needs of our service providers to efficiently collect data, submit timely reports to funders, conduct data analysis to evaluate both individual clients' needs and overall system response needs, and be able to communicate securely with additional data systems.

Project Background

The state of Connecticut conducted several feedback sessions related to HMIS with service providers and funders across the state. These sessions provided valuable insights into the challenges in day-to-day operations related to data collection and reporting out of the existing HMIS solution in Connecticut. These challenges necessitated the use of external data collection systems to meet the needs of providers leading to degradation in HMIS data quality and has continued to erode overall confidence in the software. As a result of the feedback, the State of Connecticut's Department of Housing recommended the issuance of a Request for Proposals to evaluate the options available to CT for improved HMIS operations.

Broader HMIS Goals

There are several goals for HMIS in Connecticut covering both functionality and data output from the software. These goals include, but are not limited to:

- Improved system functionality
- Consistent reporting & visualization methodologies
- Standardization of data quality assurance protocols
- Cross system collaboration with external data systems like Department of Social Services, Medicaid, Corrections, and other administrative data sources
- Data warehousing for integration and analysis with other service delivery systems

2. About HMIS in CT

Since 2004, communities across Connecticut have been entering data into the CT Homeless Management Information System (HMIS). Since that time, this statewide database has collected client demographic, service usage and length of stay information on over 200,000 unduplicated clients. The current software in use in Connecticut is provided by CaseWorthy, Inc.

HMIS Leadership in CT

The CT HMIS governance structure is designed to ensure the system operates efficiently, securely, and transparently, while being responsive to the needs of the community. The governance framework includes the Housing and Homelessness Data Strategy Board (DSB), the CT HMIS Lead Agency, the CT HMIS Admin, and various roles within participating agencies. This structure is supported by a commitment to continuous improvement, data security, and strategic partner engagement.

Governance

The Housing and Homelessness Data Strategy Board (DSB) is responsible for overseeing Connecticut's statewide Homeless Management Information System (CT HMIS) and fostering a cohesive approach to data strategy. The DSB's vision is to unite stakeholders in enhancing Connecticut's homelessness data infrastructure for analysis, performance measurement, and system improvement. This ensures informed decision-making for individuals and families experiencing homelessness and the agencies serving them.

HMIS Lead

The CT HMIS Lead Agency, Advancing Connecticut Together, oversees the overall HMIS contract, ensuring that all activities align with regulatory requirements and broader strategic goals. While the Lead Agency ensures the system's compliance and effectiveness, the day-to-day operations, including the technical and administrative tasks, are managed by the CT HMIS Administrators.

HMIS Administration

Nutmeg Consulting, LLC provides complete HMIS administration services for the CT HMIS implementation. Nutmeg Consulting plays a pivotal role in the technical and operational management of the HMIS software. This role includes:

- **System Configuration and Maintenance:** Configures and maintains the HMIS software, customizing data fields and user permissions to meet the specific needs of the community.
- **System Management:** Manages the technical infrastructure, oversees software updates, and ensures the overall integrity and security of the system.
- **Data Quality and Integrity:** Actively monitors data entry processes, addresses discrepancies, and generates reports to maintain high data quality.
- **Technical Support and Training:** Provides essential technical support and coordinates regular training sessions for participating agencies, ensuring users are equipped with the necessary skills and follow best practices in data entry and system usage.
- **Security Management:** Ensures strict adherence to security protocols, including multi-factor authentication and regular audits, to protect sensitive client data.
- **Compliance and Monitoring:** Conducts detailed monitoring of compliance with HMIS policies and procedures across all participating agencies, ensuring that data quality and security standards are consistently met.

System Overview as of August 31, 2025

Vendor

The current vendor for the statewide implementation of HMIS is CaseWorthy.

Projects by type

Project Type	Total Projects	Total Inactive	Total Active
Permanent Supportive Housing (disability required)	860	370	490
Rapid Rehousing	395	148	247
Services Only	286	67	219
Street Outreach	200	43	157
Homelessness Prevention	190	13	177
Emergency Shelter: Entry Exit	159	62	97
Emergency Shelter: Night-by-Night	156	53	103
Transitional Housing	149	72	77
Coordinated Assessment	52	13	39
PATH	41	35	6
Permanent Housing-Housing Only	24	2	22
Permanent Housing-With Services (no disability required)	21	7	14
Day Shelter	10	3	7
Safe Haven	7	0	7
Other	66	35	31
Non-HUD Funded HMIS Project	190	132	80
HPRP	8	8	0
Grand Total	2817	1063	1773

Organizations & User Totals

There are 460 Organization Records in HMIS, however only 177 are participating agencies contributing to the system at present.

There are 7,257 User Records in HMIS, however only 1,070 are active users at present.

Customizations

There are 2,074 Software Customizations and 2,898 Custom Database Objects specific to CT HMIS in our existing implementation.

Data Warehouse

There are 7 Agencies paying for 11 End Users to access the Data Warehouse which is a copy the CT HMIS data system.

3. Scope of Minimum Software Requirements

3a. HUD/Federal Partner Data Collection & Reporting Compliance in Accordance with Data Standards and Technical Standards

Please describe your organization's experience with HUD/Federal Partner required data collection and reporting, including an overview of the workflow within the software. Please include your organization's involvement with HMIS Vendor Workgroups provided by HUD/TA Firms. Please provide your organization's process for handling Data Standards Updates, including timeframes for availability of an alternate testing environment.

3b. Real-time Reporting

Connecticut requires real-time reporting for all data collected in HMIS. This includes:

- All federal and state funded project reporting reflects corrected/updated information immediately
- Fully functional reporting with detailed sub-reporting for troubleshooting data issues for the following: CoC APR, Coordinated Entry APR, ESG CAPER, PATH Reporting, RHY Compliant Export, LSA Export, HIC/PIT Export, System Performance Measures with flexibility for analysis at a more granular level than just CoC level, and SSVF Export and Reporting
- Ability for end users to query and/or visualize HMIS data using predefined logic aligning with report programming specifications
- Standard reporting for identifying duplicate clients, data quality, clients enrolled in programs, inactive clients still enrolled in programs, services reporting, funds available/spent for financial service-based projects, referral reporting including referral outcomes

Please describe the capacity for your software to provide real-time reporting.

3c. Mobile Technology

Connecticut requires an HMIS capable of data collection in the field, especially for street outreach providers. The mobile interface should include responsive data collection on a mobile phone or tablet that has full integration with HMIS. The data collection should allow for progressive engagement approaches or entire intake workflows and include the ability to enter case notes by either typing or using voice-to-text capabilities. The mobile component must include geospatial data including longitude and latitude coordinates. Additionally, the mobile component must include the capacity to temporarily store data collected in the event of poor connectivity to cellular or Wi-Fi service.

Please describe the mobile capabilities of your software.

3d. Case Management

Providers in the state of Connecticut use HMIS for case management purposes. However, as end users have expressed frustrations with existing functionality, more agencies are investing in third party solutions from vendors outside of the HUD/HMIS universe. This creates a disconnect from HMIS from some providers, while others resort to duplicative data entry. Please describe how your software addresses the following:

- Case Notes, including templates and supervisor review/sign off, note sharing/restrictions
- Automated alerts for required data collection based on HUD Requirements (annual assessments, inactive appearing enrollments on caseloads, etc)
- Document uploads, including storage and security details related to identification documentation like drivers' licenses, birth certificates, social security numbers, and disability verification
- Client dashboards providing case managers critical information about a client at a glance
- Case Management dashboards providing case managers an overview of their caseload at a glance

Please describe the case management features and functionality of the software.

3e. Coordinated Entry

Connecticut implemented a coordinated entry system for people experiencing homelessness a few years prior to HUD releasing data standards for this program component. This led to the use of an alternative data collection system, Smartsheets, for gathering important information related to client housing needs. While it provides a more simplified interface with more data manipulation capabilities than HMIS, Smartsheets is not governed under the same umbrella as HMIS and the use of this system could jeopardize data security. Use of this secondary system also increases the time it takes for a client record to be entered into HMIS, creates a need for duplicative data entry, and reduces efficiency for providers.

Please describe the capacity of the HMIS Software to meet the needs of coordinated entry including the following:

- 211 and local hub interfaces for CE, including intake appointment scheduling and bed or unit reservations
- Real-time data availability and manipulation within software
 - Integration with Smartsheets and the HMIS software will ultimately eliminate the need for an external solution for real time data manipulation
 - By Name Lists with automatic CE Enrollments
 - Easy addition or removal of visible fields for refining CE Client List/BNL

3f. Financial transaction management

Financial transactions for clients who receive Rapid Rehousing, Diversion, and Prevention services operate using a process of request submission, review, and then acceptance or denial. As end users submit requests for funds to pay for their clients' eligible costs, they need to know if funds remain in the grant to pay them. Please describe how financial transactions are submitted, reviewed, and documented as approved/rejected within the HMIS software. Additionally, please describe how the remaining unspent funds are displayed to case managers to ensure grants are not overspent.

3g. Data Entry

Connecticut HMIS end users often experience issues with data quality due to challenging software environments. As data collection requirements grow, end users often feel frustrated with HMIS due to cumbersome workflow processes, slow response times, and lack of data validation leading to delays in data entry, inaccurate or incomplete information, and reliance on external systems for tracking critical

pieces of client information. These delays and inaccuracies impede the ability to provide real-time shelter bed availability, accurate counts of actively homeless clients, and resource matching.

Please describe your software's functionality related to the following:

- Data validation to prevent inaccurate data where possible
- Workflows for client entries, updates, and exits are user friendly and can be paused and resumed at another time if necessary
- Mobile friendly interface for case managers working away from a desk

3h. User Management

Please describe your software's User Management functionality including the following:

- Addition/Deactivation of User Accounts for Organizations
 - User accounts can be granted access to projects outside of their organization for collaborative projects
 - User activity audit capabilities
- Password changes required every 90 days
- Users can reset their own password if forgotten
- User account inactivity

3i. System Administration

Please describe how your software performs the following system administration tasks:

- Organization and Project Setup alignment with federal data standards
- Project Administration, including ensuring users have access to any projects necessary, regardless of their organization
- User Administration-add, deactivate, audits
- Deduplication of client records
- Ability to import and export data using HUD CSV at minimum
- Support of APIs for secure data sharing

3j. System Customization Support

Connecticut's HMIS has a large volume of system customizations allowing for additional data capture and functionality within the platform. Please describe your approach to providing the following:

- Support for existing customizations (see Appendix A)
- Flexibility for future customizations to the system
- Integration of existing and future software solutions, including for cross system data sharing

3k. Data Security

Maintaining client data security is paramount to the operation of the HMIS. Please describe your system's experience with the following:

- Meets or exceeds HMIS Privacy & Security standards in 2004 HMIS Data & Technical Standards Notice
- System includes secure connections to web hosted database
- Enhanced security for SSN protection
- Inactivity timeouts
- Use of 2-factor authentication
- Process to archive/destroy/deidentify client level data after 7 years of inactivity
- Procedures for notification, mitigation, and resolution of security breaches
- Policies for third-party use of data
- Data ownership policies

3l. Customer Service & Support

Maintaining access to HMIS 24 hours per day is integral to the success of the implementation. Please describe the priority levels given to the following service issues, expectations for the timing of resolutions, and communications with CT HMIS representatives:

- Unanticipated system downtime where all end users are unable to access HMIS Software
- Software unavailable to individual agency
- Software functionality impacted with no alternative workarounds to access content
- Software functionality impacted with alternative workarounds available
- Occasional system outage
- System fully operational, and the support requests related to system enhancement

Please describe your process for Software & Database System Backups.

Please describe how the system will maintain at least 99% system uptime. Please include plan for maintaining system speed and reducing navigation lag time.

Please describe your disaster recovery plan.

Please describe training and support for system administrators and end users, including what documentation exists for system administrators and end users.

Please provide average resolution time for support tickets based on level of severity.

3m. Database Servers

In the existing HMIS environment, several copies of the database exist to meet the needs of developers, trainers, and data warehousing. Please describe the process to maintain 5 databases for each of the following: production, support, training, testing/development, and copy for data warehousing.

3n. Americans with Disabilities Act Compliance

Please describe your compliance with the revised section 508 standards, including Web Content Accessibility Guidelines (WCAG) 2.0. Please include the testing tools used to validate compliance with section 508 for Information & Communication Technology (ICT).

3o. Additional Functionality

Please describe any additional functionality designed to enhance and support providers in preventing and ending homelessness, including, but not limited to, predictive analytics, data visualization capacity, API functionality, etc.

Applicant Requirements/Documentation

4. Eligible Applicants

Please describe how your organization meets the following requirements:

- Preference for vendors with 5 or more years of experience with HMIS, 3 years minimum required
- Preference for vendors with 5 or more years of experience in understanding and implementing federal, state, and local data collection and reporting requirements, 3 years minimum required
- Preference for vendors who have 5 or more years of experience working with Continuums of Care, nonprofits, state governments, and other agencies serving people experiencing homelessness, 3 years minimum required
- Preference for vendors who have 5 or more years of experience with data hosting, data security, data storage, network operations, comprehensive backup procedures, system uptime reliability, system redundancy, and reliability for a statewide solution, 3 years minimum required
- Demonstrated experience and timely successful data migration using both the HUD mandated CSV schema and custom data fields, including references for the three most recent migration customers
- Demonstrated understanding and compliance with federal regulations for CoC and federal partner projects standards, reporting, and data security
- Demonstrated experience with collection and reporting of all HUD Required Data Elements and Compliance Reports

5. Capacity & Solvency

Proposal must include the following attachments:

- 5a. Articles of incorporation with any amendments included, and all by-laws of corporation
- 5b. Audited financial statements for last two years or statement of why no audit was done.
- 5c. Conflict of Interest Policies
- 5d. Most recent SOC 2 Report
- 5e. Resumes for organization leadership, as well as team members who will be dedicated to the CT HMIS project
- 5f. Evidence of Liability and Workers Compensation Insurance
- 5g. Litigation and Contract Compliance Certification
- 5h. Confidentiality Policies & Procedures
- 5i. Third party engagement details for any deliverables necessitating the use of an outside agency

6. References

Proposal must include a minimum of three references from 3 HMIS Lead Agencies including CoC Code, HMIS Lead Organization Name, Lead Organization Point of Contact and Email/Phone, Scope of Services Provided, Length of Time as a Customer, and Implementation Size.

- If possible, at least 1 reference should come from an agency who migrated to the vendor's platform in the last 2-3 years.
- References will be asked to meet virtually and respond to a standardized set of questions related experiences with the deliverables in this RFP
- If unable to contact all three references, additional references may be requested

Please note the current vendor for CT HMIS is exempt from providing references.

7. Proposal Content & Submission

Please submit a single PDF containing the following:

1. 1 Page Cover Letter
2. 1 Page Organization History/Philosophy/Mission
3. 1 Page Organization Experience
4. Detailed description of how software solution meets or exceeds the minimum requirements described in section 3
5. Description of how your organization meets eligibility described in Section 4
6. Documentation of capacity and solvency described in section 5
7. References described in section 6
8. Two Cost Detail Tables
 - a. Comprehensive Itemized Cost Details for **all** functionality described in Section 3
 - b. Cost Details for what would be included within CT HMIS Budget of \$180,000 per year
 - c. Items to include in pricing details:
 - i. Software Licensing Fees
 - ii. User Licensing Fees
 - iii. Migration Costs
 - iv. Training Costs
 - v. Customization Pricing Structure
 - vi. Ongoing Support Fees
 - vii. System Maintenance Fees
9. Proposed Project Implementation Timeline (Assuming Tentative Project Start in July 1, 2026)
10. Software Demonstration Availability
 - a. Available Dates/Times for Product Functionality Demonstration between **March 30, 2026 and April 3, 2026.**
 - b. Access information to a demonstration system for testing software if possible
11. Contract Terms for years 1, 2, 3-5, and ongoing.

Page limit for proposal

The page limit is fifty (50) pages including cover letter, organization history, and experience; excluding attachments described in sections 5 and 6.

8. Proposal Submission Information

Please compile all materials for this proposal into one PDF and email to the HMIS Lead Agency Advancing Connecticut Together: John Merz, Chief Executive Officer, jmerz@act-ct.org and Jackie Gardner, HMIS Director, jgardner@act-ct.org no later than **March 25th at 8:00pm EST**.

Scoring

The Data Strategy Board RFP Subcommittee includes representation from the HMIS Lead Agency, Advancing Connecticut Together, State of Connecticut's Department of Housing and the Department of Mental Health & Addiction Services, and Service Providers. The DSB RFP Subcommittee will review and score proposals using a 100-point scale for the following criteria:

Section 3: Software Requirements Scoring (55 Points Maximum):

- 3a. HUD/Federal Partner Data Collection & Reporting Compliance in Accordance with Data Standards and Technical Standards: 4 points maximum
- 3b. Real-time Reporting: 4 points maximum
- 3c. Mobile Technology: 4 points maximum
- 3d. Case Management: 5 points maximum
- 3e. Coordinated Entry: 5 points maximum
- 3f. Financial Transaction Management: 3 points maximum
- 3g. Data Entry: 6 points maximum
- 3h. User Management: 4 points maximum
- 3i. System Administration: 5 points maximum
- 3j. System Customization Support: 3 points maximum
- 3k. Data Security: 4 points maximum
- 3l. Customer Service & Support: 4 points maximum
- 3m. Database Servers: 2 points maximum
- 3n. ADA Compliance: 1 point maximum
- 3o. Additional Functionality: 1 point maximum

Section 4: Eligibility Scoring: 5 points maximum

Section 5: Capacity & Solvency (All Attachments Provided): 5 points maximum

Section 6: References: 15 points maximum

Section 7: Proposal Content (All 11 Sections Included): 5 points maximum

Software Demonstration: 15 points maximum

Proposals must meet a scoring threshold of 70 points for consideration.

Q&A Session for Bidders

March 4, 2026

Questions for Bidders Session should be sent via email to the HMIS Lead Agency, Advancing Connecticut Together, no later than **February 25, 2026** Emails should be sent to John Merz, Chief Executive Officer, jmerz@act-ct.org and Jackie Gardner, HMIS Director, jgardner@act-ct.org. Responses to questions will be provided during the Q&A Session.

The QA Session is at 2:00 EST on March 4, 2026.

<https://meet.google.com/kaj-cyoj-dwv>

Or dial: (US) +1 650-535-0883 PIN: 217 423 086#

Appendix A-Existing Customizations in CT HMIS

Customization Index - Internal to Software (Additional Information for each section follows)	Number of Customizations	Notes
General Customizations	29	These represent more complex, multi-form and code features and exclude some of the simpler quality of life customizations that hide/show fields. Typically, these customizations are based on specific funder, organization or provider requirements
Reports	58	Each report varies in complexity, we have several reports with 1000+ lines of code, such as the BNL
Data Quality Framework & Rules	28	This custom module has independently created rules, which usually include 3 or more stored procedures as well as properties and behaviors
Internal Administration Tools	51	These vary from simple to complex custom tools to better manage support, setup and maintenance of users, programs and organizations and other data or tools in the system.
Scheduled Jobs	53	These are custom database jobs that perform a variety of functions in the system, some run hourly, some are triggered as needed and others run weekly or monthly.
At a Glance - Functions	20	Similar to the Data Quality Framework, this framework allows creation and display of custom rules to be displayed, each rule may involve one or more queries, tables, stored procedures in the system and range in complexity.
Workflows	33	CaseWorthy includes methods to control how screens show in dedicated workflows allowing greater control of data collection and ease of use. We have several workflows that are used system-wide and others that are for specific functions or activities such as ID card generation.
Roles	36	CaseWorthy allows custom menus and dashboards to be displayed for different users depending on their task and security level, this is useful for restricting actions to certain groups, making custom interfaces for specific programs and functions.
Dashboards	5	PowerBI dashboards, which query data from the data warehouse, these dashboards usually are complex and would require a rewrite if moved to another system.
Assessments and Forms	1761	The total of custom forms/assessments does not mean every form /assessment is in use. A customization may be comprised of 1 or a dozen different forms. Older versions of forms are not usually deleted for reference purposes.
Total	2074	

Custom Database Objects	Count	Notes
The numbers below are rough counts of fields that did not come "baseline" in CaseWorthy and were created for various usages in the system. Their usage is often part of a larger customization and represents one or more changes that allowed that customization to be made or a past history of the customizations.		
Column (Custom Fields)	2064	Custom fields for data collection. The count does not reflect active versus in-active data fields. Many are used for single events or special needs or are replaced with updated fields over time.
Function	10	Custom database functions with a variety of purposes
Triggers	15	A trigger is a special type of stored procedure that automatically executes a predefined set of SQL statements in response to a specific database event.
Stored Procedure	207	A SQL database stored procedure is a prepared collection of SQL statements and optional control-of-flow statements (like loops, conditional statements, and variable declarations) that is stored in the database and can be executed as a single unit. These are used for various tools and customizations listed above
Table	239	Tables created in addition to baseline. Note: Some of these were created by the vendor and some by Nutmeg Consulting. Used in various customizations listed above, custom data collection elements and functionality.
View	363	A view is a virtual table whose content is defined by a SQL query. Unlike a regular table, a view does not store data itself; instead, it presents a dynamic representation of data derived from one or more underlying base tables or even other views. These are used throughout the system to generate forms, retrieve data and provide data via export.
Total	2898	

General Customizations

Customization Name	Description / History
Acuity Index	This workflow was developed for HUD/HOPWA programs and is a customization of the core Outcomes system to handle Acuity measures. <ul style="list-style-type: none"> - 2 custom forms - 2 views/queries - 1 Custom report "HIV / AIDS Acuity Index Report (Org)"
CCADV	This workflow creates anonymized client records that are used to work with our domestic violence parties. The customization consists of. <ul style="list-style-type: none"> - 2 Workflows (Entry/Exit) - 1 custom client form - 1 custom exit assessment - Client Edit form variation - 1 stored procedure to populate and derive various data - 1 database trigger

Direct Database Access	CT has direct database access, which has allowed us a far greater latitude in terms of support and customization. This is more a service/feature that our vendor offers which is exceedingly rare currently. Most vendors have moved away from it. Due to us being a grandfathered-in platform, even with the recent move to a co-host, we retain most of the control here. It allows direct query and manipulation of the database, makes things like the Data Warehouse possible and allowed us to create things like the Data Quality Framework.
Project Setup Script	Due to the large and varied number of programs with different data collection needs, Nutmeg created a method to catalogue all the variations to control the following: <ul style="list-style-type: none"> - Assessments (including order, on what events to show and for which household members) - Services (assigned per project) - Type (HUD standard) / Subtype (Non-Standard)
HDC Users Email (Automation)	This customization emails a copy of all the users with access to the designated HDC (HMIS Data Coordinator) on a quarterly basis, including basic audit data. The customization consists of- <ul style="list-style-type: none"> 1 Dynamic email template 1 Query to power the email list 1 approval group setup and maintained Integration with the built in team/approval groups functionality
Covid-19 Customizations	Created during the COVID-19 Pandemic, this system is still used today in various ways, though parts are currently not in-use, they can be revived should a similar event occur.- <ul style="list-style-type: none"> A hotel/motel attendance integration system, consisting of several forms and 2 workflows (Currently mothballed until needed again) Report: COVID-19 Data Extract w/Org Filter Report: COVID-19 Extract Report: COVID-19 Vaccinations Report View: COVID-19 Housing List Form: Medical Information Assessment

	<p>(Client Specific)</p> <ul style="list-style-type: none"> - Form: Housing Location Assessment (Client Specific) - Form: COVID-19 Vaccination Record (Client Specific) - Dashboard Alert: Vaccination Status
Dupe Client Check	<p>An improved version of the baseline CaseWorthy duplicate client check script, we developed to further lower the number of duplicate clients being created and provide more control over the flow. Complex logic and case statements are used to get the best results and reduce duplication.</p>
Banned/Barred Clients (View)	<p>A wider, more flexible version of the baseline form version, used in Coordinated Entry and Emergency Shelter programs</p>
At a Glance	<p>A custom quick info and fix system, this system is designed to allow collection of various data points from across the system and client record into the most relevant data available. Additionally, it has shortcuts to edit/update or correct data in fewer intra-system clicks, shortening navigation time, as well as a built-in help system. The customization consists of</p> <ul style="list-style-type: none"> - 21 elements, some of which contain complex logic or collate data across periods of time or other report logic, such as the BNL. They complexity of each element can vary greatly. - 2 Database Views - 4+ Tables - Multiple queries per data elements

CAN / 211 Client Dashboard	<p>Custom dashboard featuring a large and varied amount of client data in a quick at-a-glance dashboard with the ability to drill down into each data point. Current Data views included</p> <ul style="list-style-type: none"> - Client Alerts (General, safety, etc.) - Client's Data Quality Alerts - Summary Count - Client's Data Quality Alerts - Most Recent 10 - COVID-19 Vaccine Status - COVID-19 Testing (Last 2) - COVID-19 Locations - Special circumstances mentioned in 211 intake - Contact Info (phone, mobile, email, etc.) - Current BNL Status (v2) - CAN Appointment Outcomes (Referrals - Last 5) - Last CA Assessment Status - CAN Navigators - Enrollments: Open Enrollments - Enrollments: Closed Enrollments (Last 3) - Services: All Services (Last 5) - Services: Service Summary
CareWare Integration	<p>Synced integration with the CareWare database. This integration is one of the more complex areas of customization and continued maintenance. Features Supported via Sync</p> <ul style="list-style-type: none"> - Dedicated VPN connection to third party database - Attachments - Sharing Consent (By-directional sync and visibility security controls) - Referrals - Poverty Level / Income - Medications - Assessment Data - Client Messages: The sync logic is fairly involved and powered on the back-end by multiple scripts, triggers and database jobs.
Housing History form	<p>View that combines manual entries for homelessness prior to or outside of the CT HMIS implementation combined with enrollments and bed nights within the CT HMIS system intended to provide a full history of homelessness in the system.</p>

Homeless Verification form w/Snapshot and sign feature	View that combines manual entries for homelessness prior to or outside of the CT HMIS implementation combined with enrollments and bed nights within the CT HMIS system intended to provide a full history of homelessness in the system. Similar to Housing History, the scope is limited and additional calculations are done to comply with DMHAS standards for homeless verification of forms. Additional functionality <ul style="list-style-type: none"> - functions to calculate episodes of homelessness (complex, with the ability to deal with overlaps and specific rules) - Ability to sign and snapshot the current data available - Ability to see a history of those snapshots over time. This involves several custom forms, tables, stored procedures and reports and features the ability to "snapshot" data at any point and have users approve that snapshots by signing it (user and manager)
Org Specific > CHA (Mercy / HoH)	Organization specific customizations. This customization consists of <ul style="list-style-type: none"> - 1 Custom Dashboard - Mercy Food Pantry Assessment (Input and summary forms) - Employment Assessment (Input and summary forms) - Education Assessment (Input and summary forms) - Query: Closed Enrollments (Last 3) - Query: All Services (Last 5)
Org Specific > Christian Community Action	Organization specific customizations. This customization consists of <ul style="list-style-type: none"> - CCA - Custom Assessment (Input and summary forms)
Org Specific > My Sister's Place	One of the main ways we customize the software is possible because we have direct database access, few vendors offer this option and when they do, it's often extremely expensive or limited in major ways. We are able to act as DB admins which allows almost complete flexibility.
Ask a Question?	Custom link to our support portal, CTHMIS.com

HOPWA Waitlist	HOPWA specific Waitlist functionality, enabling data collection required by HOPWA providers. This customizations consists of <ul style="list-style-type: none"> - 1 Workflow - 2 Forms (add/edit) - 1 View
Current Client Chart	A custom dashboard, composed of multiple queries and two custom dashboard views that let you quickly see a list of clients in the system and charts out their comparative size visually compared to other programs in a users organization. This customization consists of <ul style="list-style-type: none"> - 2 dashboards - 2 queries involving 3+ tables and is available on most case management roles
Read-Only Data	Legacy data from the Provide system of New haven, in a read only, simple and exportable format. This customization consists of <ul style="list-style-type: none"> - Action Plans (Summary and Detail Forms) - Client Profile (Summary and Detail Forms) - Condition - HIV (Summary and Detail Forms) - CSN Referral Forms (Summary and Detail Forms) - Referrals (Provide Specific) (Summary and Detail Forms) - Service Plans (Summary and Detail Forms) - Treatment Plans (Summary and Detail Forms)
Release of Information	We leverage a custom release of information workflow to fit CT's unique requirements. This process has changed several times over the years.
Organization Sharing & Security	The security and organization sharing settings in CT were customized to meet privacy needs of client data for CT and the organizations and requirements unique to Connecticut's system. Multiple forms (dozens), stored procedures and parts of the software have been customized to adhere to these rules.
Data Quality Framework & Rules	This custom module has independently created rules, which usually include 3 or more stored procedures as well as

	properties and behaviors. This is a complex system using dozens of queries, several tables, stored procedures run as jobs, forms, dashboards and queries to create a robust data quality system that can be added to and customized as need.
CHES Export	Automated data export for client matching across the CT HMIS system and used to compare, runs weekly. The file is automatically generated and provided to the target by secure FTP.
Client Default Dashboard Customization	This customization is present across most roles and features quick access to the following information.- Client Alerts (General, such as safety, important client notes) <ul style="list-style-type: none"> - Client Data Quality Alerts (Tie-in Alert board to our custom DQ system) - COVID-19 vaccination Status - Contact Info shortcut - Current BNL Status - Last CA Assessment - Last services given - Open Enrollments - Closed Enrollments (Last 3) - CAN Navigators - CAN Appointment Outcomes
"Reports" Dashboards (4 variations)	Tab dedicated to organizing reports and exports. Due to the security requirements of Connecticut limiting who can run reports on all programs and orgs, even baseline forms provided by CaseWorthy need a custom form to limit who can access what. Additionally, there are different versions of the report tab for specific roles, such as "Nutmeg Staff" and "System Wide Reporting".
Warpcore / Engage data sync to CaseWorthy	We developed two bits of complex software to make data entry for street outreach programs easier. Engage <ul style="list-style-type: none"> - A mobile-first web application that works offline and allows creation of engagement records, case notes, client records, current living situation, location, etc. This project was developed with actual outreach worker feedback and has been rolling out the last two quarters, with new features

and fixes rolling out consistently every two weeks.

Warpcore

- Our data synchronization and reporting engine, currently this syncs data between Engage and Warpcore and features sophisticated logic for client matching as well as uni-directional and bi-directional syncs of records. Integrations like the current caseload screen automatically load records into Engage from CaseWorthy into Engage and create enrollments or match to existing enrollments inside the CT HMIS database.

At a Glance Functions

At a Glance Function	Description / History
# Days Homeless (Last Three Years)	Query to calculate # of days homeless (Complex formula considering multiple points of data such as exit destination, entry/exit dates, Current Living situation. calculated nightly)
BNL Status	Status on the BNL. This is derived from a stored copy of the BNL that runs nightly via a database job, which is then queries against. See BNL logic for more information
Chronic Verified Yes/No	Chronic Verification Status (Formula derived)
Chronically Homeless (HUD)	Chronic Homeless Assessment derived, looks at most recent (query)
Contact Info	Consolidation and formatting of multiple contact info fields
Current Age	Calculated Age, based on today's date versus D.O.B. (Query + Formula)
Current CAN Enrolled	Name of the most current open CAN program enrollment (query)
Current Case Manager(s)	Consolidated view of Case Managers that are active with the client
Currently Housed By	Query to show where the client is currently housed, filtered by specific program types
Desires Housing in Different CAN	Show where the client wants to be housed, based on latest 211 or CAN assessment data
Disabling Condition(s)	Looks at latest disabling condition data, taken from several HUD standard questions (formula)
Health Insurance	Scannable list of health insurance benefits, taken from latest assessment data
Income Change	Has income increase/decreased and by how much (Query + Formula)
Last approximate Homeless start date	Latest homeless start date from assessment data
Latest Income (Details)	Latest income sources
Latest Income Total	Latest income total (Query + Formula)
Non-Cash Benefits	Latest non-cash benefit sources
Preferred Community (211 Intake)	Latest 211 assessment data for preferred community
Veteran Status	Latest veteran status

Customized Forms	1760 custom forms in use
-------------------------	--------------------------

Customized Schedule Jobs

Customization Name	Description / History
CTHMIS_Dev - Update Dev Passwords from Prod	Script that sync the developer copy of select administrators account password with the Dev installation when refreshed to keep passwords in sync.
CTHMIS_DW - BackupCCEHRestoreCCEH_DW	Script used to create the Data warehouse, data is processed and anonymized, picklist items are transformed into an easier to use format and other optimization take place.
CTHMIS_Prod - Auto close 211 Referrals - Issue 2084	Closes 211 referrals to CANs when they have been open to long, updates various data points in the referral record.
CTHMIS_Prod - CCEH User Client Access	Sets up CCEH users with all org access (Now ACT)
CTHMIS_Prod - Close Old Referrals - Case 3512	Cleanup script for a specific instance of old referrals
CTHMIS_Prod - Custom Merge Clients in X_PendingClientMerges	Part of our custom merge client script, which handled things non-destructively and made undoing bad merges easier.
CTHMIS_Prod - CW_Alert_ChronicHomelessConflictingData	Conflicting data alert for Chronic Homelessness, works with the Data Quality Framework module.
CTHMIS_Prod - CW_Alert_ClientGaveVerbalConsent	Reviews ROIs and if only a verbal consent is delivered, a reminder to the baseline client alert system is displayed on a client's profile.
CTHMIS_Prod - CW_Alert_ProgramAssessmentReminders	Alert reminder for clients who need a yearly or update reminder for assessments.
CTHMIS_Prod - CW_Tools_90DayUserCleanup	This cleans up users who have no logged in within 90 days, locking them out of the system till they undergo retraining (pending discussion)
CTHMIS_Prod - CW_Tools_Restore_Override_Baseline	Script that makes specific baseline stored procedure modifications such as the enhanced client search
CTHMIS_Prod - CW_Tools_Update_CE_Events	Auto-creation of CE Events based on various logic, saving extra steps of manual creation
CTHMIS_Prod - CW_Tools_Update_HomelessnessDuration	Auto-correct user entered data entry issues when they can't exist logically.
CTHMIS_Prod - CW_Tools_Update_Records	
CTHMIS_Prod - Delete Client records tagged for deletion	Custom delete client function, faster and less table locking than the baseline script
CTHMIS_Prod - Kill Dormant Users	Disconnects dormant database connections
CTHMIS_Prod - Nutmeg Update Stats (Daily)	Statistics collection and reporting for contractual obligations
CTHMIS_Prod - Nutmeg Update Stats (Weekly)	Statistics collection and reporting for contractual obligations
CTHMIS_Prod - Process Hartford CAREWare shared data	Job that powers the data transfer for the CareWare sync customization
CTHMIS_Prod - Process Process Date Sample Template	

CTHMIS_Prod - Refresh Hybrid Housing History Data Nightly	Job that feeds part of the Hybrid Housing History custom view
CTHMIS_Prod - Run X_AddClientAddress	Add a default address to clients in the system if one is accidentally deleted, making the client unfindable
CTHMIS_Prod - Run X_BuildX_ListIDValues	Used for the data warehouse to build the referenced list views for the picklist
CTHMIS_Prod - Run X_CreateClientAlertNoROI	This script creates an alert for clients with no ROI (data entry error or special cases)
CTHMIS_Prod - Run X_CreateDefaultsNotNullColumns	
CTHMIS_Prod - Run X_CreateOrgMOUs	Auto create MOU's based on security settings, required for CT's unique sharing setup
CTHMIS_Prod - Run X_DeduplicateDocumentCheckIDs	Script to correct a rare, hard to diagnose error in the system with the document check function
CTHMIS_Prod - Run X_DupeClientLoad	
CTHMIS_Prod - Run X_LoadUsersOrganization_UserProviders	This calculates a list of Orgs/Providers that are related for an internal view
CTHMIS_Prod - SendJobFailureReport	Custom job failure alerts that tie into our help desk
CTHMIS_Prod - Service Ticket #48818 - Incorrect people showing up on Greater Hartford CAN BNL	Auto-correct a common data entry error
CTHMIS_Prod - Update BNL v2.14 Sample	Runs the BNL and stores a daily snapshot in our DB for use on several views and reports
CTHMIS_Prod - Update CAN Resource Bedlist Enrollment EndDates - Ticket 78776	Auto exit of bedlist enrollments that have a matching program exit date
CTHMIS_Prod - Update Covid Testing Expired Date (daily)	Expired / End Dates vaccinations based on Gov. Regulations to indicate another vaccination is required
CTHMIS_Prod - Update Duplicate CAN Appointment Services to Deleted - Issue 1816	Fixes an issue that occurs occasionally, duplicated CAN appointments (user error or if system has unusual slowness)
CTHMIS_Prod - Update Duplicate Shelter Services to Deleted - Issue 1777	Fixes an issue that occurs occasionally, duplicated ES check-ins (user error or if system has unusual slowness)
CTHMIS_Prod - Update EnrollmentMember.EndDate from Enrollment.EndDate where ended	Syncs End dates when they vary between two related records
CTHMIS_Prod - Update ES Bed Night Service EndDate - Issue 1839	Syncs End dates when they vary between two related records for bed nights
CTHMIS_Prod - Update Job Fail Log	Adds failed jobs to a log for alert creation
CTHMIS_Prod - Update Service.EnrollmentID for orphaned records - Ticket 82880	Fixed an occasional error w/stray records
CTHMIS_Prod - Update Service.Location for orphaned records - Ticket 233298	Fixed an occasional error w/stray records
CTHMIS_Support - BackupCCEHRestoreCCEH_Support	Custom script to update the Support DB with a copy of the live DB every day, with some user accounts altered to allow access

CTHMIS_Support - CW_Tools_Update_CE_Events	Runs some cleanup and autocreation for CE Events based on Program type/Enrollment Type
CTHMIS_Support - CW_Tools_Update_Records	Fixes a few common record issues
CTHMIS_Dev - CW_Tools_Update_CE_Events	Runs some cleanup and autocreation for CE Events based on Program type/Enrollment Type
CTHMIS_Dev - CW_Tools_Update_Records	Fixes a few common record issues
CTHMIS_Train - BackupCCEHRestoreCTHMIS_Train	Train DB customizations, such as anonymizing/scrambling records and creating of specific training accounts on an automatic basis
CTHMIS_Train - CW_Tools_Update_CE_Events	Runs some cleanup and autocreation for CE Events based on Program type/Enrollment Type
CTHMIS_Train - CW_Tools_Update_Records	Fixes a few common record issues
CTHMIS_Train - Update Train Users from Prod	Updates Train user accounts daily, versus the weekly script for other items
CTHMIS_Uat - CW_Tools_Restore_Override_Baseline	Script to override scripts in the UAT environment such as Client Dupe Search
FormLoadTimeLog/WorkflowInstanceStatus Purge	Purges out excess instances over X months, to save space on server and keep the lists short.

Workflow Customizations

Workflow Name	Description
General HMIS and Funder Workflows	
Emergency Shelter - Intake	Customized to accommodate Emergency Shelter enrollment requirements
Emergency Shelter - Exit	Customized to accommodate Emergency Shelter enrollment requirements
Emergency Shelter - Exit Enroll w/ Reservation - CTHMIS	Customized to accommodate Emergency Shelter enrollment requirements
CTHMIS Intake - CTHMIS - General - COVID	CT's general HMIS intake assessment, additional covid functionality later added
CTHMIS - Enrollment Exit	General HMIS workflow for program Exit with CT specific customizations
CTHMIS - Entry/Exit Program Intake - CT HMIS	General HMIS workflow for program Entry with CT specific customizations
CTHMIS - Updated Consent	ROI/Consent Workflow customized for CT's approach to releases
CTHMIS - Other Adult-Updated Consent	ROI/Consent Workflow customized for CT's approach to releases (other adults)
Coordinated Access Specific Workflow	
Coordinated Access - 211	211 specific Coordinated Entry workflow
Coordinated Access Network - Entry - CAN	CAN Entry workflow for Coordinated Entry
Coordinated Access Network - Exit - CAN - CA	CAN Exit workflow for Coordinated Entry
Coordinated Access - WAITLIST - CAN - CA	CAN Waitlist workflow
Other Workflows	
Create ID w/Photo	Workflow to optimize creation of Photo IDs
COVID - Exit	COVID Exit Assessment (Retired)
CCADV - Add DV Client	Domestic Violence anonymous client creation
HMIS Intake - RHY - 5.2	Runaway Homeless Youth workflow (security specific settings and assessments)
HMIS Intake - RHY - COVID - 8/16/21	Runaway Homeless Youth workflow (security specific settings and assessments, additional covid data)
HMIS Intake - YHDP Minors	Youth Homelessness Demonstration Program
Housing Mobility	Housing Mobility program
PATH Outreach / DMHAS - Pre-Enrollment	PATH outreach specific workflow with pre-enrollment logic
Runaway Homeless Youth - CTHMIS	RHY specific intake workflow
Waitlist Workflow - HOPWA	HOPA Program Waitlist Workflow
Testing Workflows	
Add Client and Enrollment FAST	Used in development for workflow testing, stripped down workflow

Add Client and Enrollment FAST wRelease	Used in development for workflow testing, stripped down workflow with Release
Testing - No Assessment	Used in development for workflow testing, no assessment version
Exit Only (No assess) - CTHMIS	Used in development for workflow testing, no assessments version

Custom Reporting

Customization Name	Description / History
Acuity Index Report (Org)	HOPWA Acuity Index report, custom for CT as this is no longer a baseline report due to governmental changes
Anonymous Record Count	Custom report for system-wide reporting, run as needed for decision makers
Arise Employment Services Program Report	Organization specific report built by request
Barcode Report	Printable barcode list, used for mass scanner based check-in
By Name List (BNL) - (Report)	By Name list used by CoCs. This is a dynamic report that replaces an older manual version which had several issues with speed and reliability of data. This report is maintained via input from the community and features extensive support documentation.
Case Load Report	Custom caseload report for case managers
Case Notes Report	Custom case note report with start/end date filters
CCA Custom Report	Used for a specific organization, custom demographics extract and breakdowns
CCEH Zip Code Report	Custom report for research purposes
CheckIn Report	For Emergency Shelters, daily review
CHN Export Report	Custom report for search and extract for Children's Health Network
Client Face Sheet	Quick glance and print report for a client
Data Outliers Report (Org)	Data quality report created by Nutmeg for CCEH. This may be considered to be abandoned as the lead agency has changed. It should be re-evaluated
DMHAS / DDAP Export 2025 (Org)	DDaP Export, custom for CT. Complex rule-set report that is revised every few years.
DMHAS Opioid Report	For DMHAS, delivered upon request
DOH Rapid Rehousing (Org)	CT custom Rapid Rehousing report, required by DOH
DOH Shelter Utilization v2 (Org)	CT custom ES report for shelters, required by DOH
Due Diligence Report	CAN report for follow-ups
Duplicate Report	Suspected duplicates in the system
ESG Program Performance	Funder specific report
ExitAgingReport	Export of age/exit destinations for programs
Food Pantry (Org)	CT custom food pantry report
Food Pantry Cross-Utilization (Org)	CT custom food pantry report
H2H Report v4	For the homeless 2 housing program, custom reporting for DMHAS. Three sub reports are present.
Home Project Report	Funder specific report
Homeless Episodes Report	Legacy report on homeless episodes based on HUD standards
Homeless Verification form (Printer Friendly)	Printer friendly version of the Homeless verification form, includes signatures
Mercy Housing Shelter Food Pantry Report	Custom food pantry report, covers three different grantee reporting requirements
My Sister's Place - Mobility Counselor (Report)	My Sister's Place - Mobility Counselor

OEC Diversion Report	Diversion program report
PATH BNL Crosswalk v2 (Org) - (Report)	Older BNL companion report, asked for by the community. Usefulness of report should be re-evaluated at some point.
PATH BNL Crosswalk v2 (Org) - (Report)	CT custom report, current usage is unknown and should be reevaluated
Pets Report	Custom report exporting Pet related data for use in housing placement
Report History Summary	Custom report that allows user to view when reports were ran and their parameters. Useful for reference and troubleshooting support
ROIs Nearing Expiration	Report for managers to see a list of clients with ROIs about to expire soon
Roster Report	Emergency shelter bed roster report, asked for by the ES community
Secure Jobs v2 (Org)	CT custom report for the secure jobs program. Requested by specific program funder. Sporadic usage
Server Activity Report	Troubleshooting information
Veteran Program data	Veteran focused reporting
Workplace Report	Custom Organization level report
Yale Data Extract	Used for a Yale study, modified twice
Youth Data Monthly Report	Ct custom report
Youth Data Regional Report	Ct custom report
Zip Code Report	Zip codes and regions breakdown of users with enrollments, CT wide usage
Usage Report v1.0	Used to monitor how often each report is used w/monthly filtering
Agency MOU Status	Looks at the agency
Anonymous Record Count	Simple query report to count anonymous client records in the system
BNL History Form	Method to track changes in the BNL for individuals.
CAN Data Cleanup Report	Data quality report for the CANs
Client In More Than One Active Family	Data quality report to deal with data entry errors with family
Conflicting Gender	Used to find conflicts in legacy Gender and current gender standard
Release of Information	Clients lacking ROIs
Shared Housing Export	Clients who agree to shared housing
CT HMIS Outcome Report v1	General CT HMIS outcome report for CT
CT Veterans Project Report	Project reporting for veterans
Clients in Period - CTHMIS	
Agency MOU Status	Nutmeg Staff
Anonymous Record Count	Nutmeg Staff
BNL History Form	Nutmeg Staff
Barcode Report	Nutmeg Staff
CAN Data Cleanup Report	Nutmeg Staff

Client In More Than One Active Family	Nutmeg Staff
Conflicting Gender	Nutmeg Staff
Release of Information	Nutmeg Staff
Shared Housing Export - v1 & v2	Nutmeg Staff
By Name List (BNL) v2.4	Nutmeg Staff
H2H Report (Testing_TM)	Nutmeg Staff
CT HMIS Outcome Report v1	Nutmeg Staff
DMHAS / DDAP Evaluation Report	Nutmeg Staff
Usage Report v1.0	Nutmeg Staff
CT Veterans Project Report	Nutmeg Staff
Client Face Sheet	Nutmeg Staff
Coordinated Access Dashboard	Nutmeg Staff
Shared Housing Export	Nutmeg Staff

Data Quality Framework Customizations

The Data Quality Framework is highly customizable built-in data quality tool. It's designed to create custom alerts for a variety of data conditions. This created by Nutmeg Consulting provides.- A custom rules engine that allows rule-based (SQL) custom scheduling, alerts and dashboards to end users

- A collection of 27 (and growing) custom rules that expand on the HUD standard data quality report, providing creator data integrity
- Features the ability to quickly jump in-app to the correct record and data entry screen to quickly correct issues
- Custom alerts on the client and program dashboards to alert of potential data quality issues
- An administration interface to create, enable, disable and schedule these rules
- Help Text and custom "fix" instructions
- Alerts can be system wide or organization wide
- Report guide, showing you which reports are affected by this error
- Ability to display "information only" alerts, which can be dismissed
- Custom view to see all alerts then search/filter by client (administration and support)

DQ Rule Script Name	Description / Corrective Instructions
Chronic Homeless is Missing Data	Client is missing data for the following fields: Disability and Sub Disability Questions
Chronic Homeless Missing Data for "HIV/AIDS" question	Client is missing data for the following fields: - HIV / AIDS
Approximate Homelessness Start Date is BLANK in the HUD Universal Assessment at Entry	Client, either the head of household or adult, has a null "Approximate Date of Homelessness" where Prior Residence is under the Homeless Situation category and length of stay (LoS) is 90 Days or Less.
Outreach enrollment without Current Living Situation Assessment and/or service for 90 days	This client has not had a Current Living Situation Assessment (CLA) completed in the past 90 days for an outreach enrollment. If the client is still active in the program, please create the CLA and enter any Services received. if the client is no longer active in your outreach program, exit them from the program.
Emergency Shelter enrollment without a bedlist checkin in 30 days	This client has an active enrollment in Emergency Shelter (Program Name) but has not had a bedlist check-in in the last 30 days. If the client is still active in the program, please update their check-in services. if the client is no longer active in your ES program, exit them from the program via the Enrollment Summary form. You can use the existing Services Screen summary fix location to see when their last check-in service was recorded.
Missing Move in date after 45 days	This client has been enrolled in program (Program Name) for more than 45 days, but lacks a housing Move-in date, please fill in the Housing Move in Date via the one-time-field form.
Client has returned to a homeless setting or temporary setting	Please verify this exit destination is accurate on the HUD Program Assessment and the enrollments are correct.

ES Bed Nights are outside of the enrollment start and end dates	"This error includes records for Clients who have bed night service/check-ins for dates that are not within their program enrollment period for Emergency Shelter – Adjust the enrollment start or end date to encapsulate the ES bed night service/check-ins or delete the bed night service/check ins that are not within the program enrollment period. Be sure to check both the Enrollment and Enrollment Member data, as both need to be reviewed as they may not agree. Note: If you are adjusting an incorrect enrollment start or end date and have this alert error showing several times, it will clear out all the related alerts when the error is next checked because all the services will now be within the enrollment period. Thus, you will not need to adjust the enrollment date for each service."
Chronic Homeless Conflicting Data	If the client is chronically Homeless, then HUD Program Assessment must have at least one disabling condition set to yes and also yes to one of the "of long duration" subquestions. Check the HUD Universal assessment and the HUD Program assessment's disability questions and ensure they agree.
Days between "Approximate date homelessness started" compared to Program Enrollment Date is greater than 365 days	The purpose of this alert is to encourage programs to review the client records showing more than 365 days between the homeless start date and program enrollment date. The length of time homeless is reported in the statewide SPM report and LSA report and negatively impacts the days homeless counts. If you have verified the data to be accurate, you may click the "Clear Informational Alert" button to dismiss this alert or you may correct the Date Homelessness started field to be less than 365 days and mark the alert as fixed.
Six Month Acuity Index Assessment Missing	An acuity index is required for entry and every 6 months the program enrollment is open.
Six Month HOPWA Acuity Index Assessment Missing	A HOPWA acuity index is required for entry and every 6 months the program enrollment is open.
Days between "Approximate date homelessness started" compared to Housing "Move in Date" is greater than 365 days	Housing "Move In Date" is greater than 365 days from "Approximate date homelessness started"
Days Homeless exceeds 180 Days	User should check to see if the client has a housing move in date that is missing
Invalid Move-in Date	Resolvable issue
Missing VI Reminder	Client, either the head of household or adult, has an enrollment where Program Type is IN (448,1447,1434) and length of Enrollment is 14 Days.
Program Assessments Reminders	It is time for the annual assessment for this household. From the head of household enrollment, complete the annual assessment workflow.
Client gave Verbal Consent	Agency should attempt to get a written consent
Create Client Alert No ROI	

Approximate Homelessness start is within the enrollment period of a PH/RRH/HP Enrollment in HMIS	To fix this issue the user must review the rules for Approximate Date Homelessness Started. This date should reflect the homeless start date immediately prior to the current program enrollment. Review the field on the HUD Universal - At Entry assessment and correct.
Alert - Enrollments that began/ended outside of the program begin/end dates	Adjust the client Program enrollment start or end date on the Enrollment OR the Enrollment Member record. Note: If client enrollment start Date and End Date are correct and should fall within the program Start Date and End Date, the program dates may be wrong, please contact support.
Emergency Shelter Bed Night is on or after Housing MI for an open RRH or PSH Enrollment	Either the PSH/RRH enrollment needs to be exited with a date prior to the ES Check-in, or the ES check-in is incorrect and will need to be deleted. To delete an ES check-in, please contact the help desk.
Enrollment is more than 2 weeks in the future	Review the program enrollment start date. If the start date is a future date then this should be changed. Please contact the help desk for assistance. Program enrollment start dates should represent the date the person starts receiving services and /or housing.
Emergency Shelter - Overlapping ES Checkin Days (Night by Night)	The users should double check their agency ES Roster and if needed contact the other ES program to confirm the actual location for the client that night.
There are overlapping enrollments between programs that provide shelter or housing	Review your organizations program enrollment and ensure both the start and end date of the enrollment is accurate. If not, please update the enrollment. If the incorrect enrollment start/end date belongs to another organization.

Role Based Customizations

Customization Name	Description / History
CCEH All Features	System level reporting role for lead agency
Emergency Shelter (ES)	Used for emergency shelter providers
Transitional Living (TLP)	Used for transitional living providers
Supportive Housing (SHP)	Used for supportive housing providers
Supportive Services (SSVF)	Used for Supportive Services for Veteran Families providers
Street Outreach	Used for Street Outreach providers
DOH Emergency Solutions (ESG)	Used for DOH funded Emergency Solutions Grant providers
DOH AIDS / HOPWA	Used for DOH AIDS and HOPWA funded providers
System-wide Reporting	A role used by the lead agency, Nutmeg Consulting and select researches to run system-level reports across the entire universe of programs.
Service Request Approval	This role allows for the administration of Service Requests from providers such as HOPWA programs and includes approval groups, custom approval workflows
Food Pantry	Used for food pantry providers
Soup Kitchen	Used for soup kitchens
Services Only	Used for service-based programs. Services programs can vary widely
Coordinated Access - 211	Coordinated Entry: Primary role used by 211 United Way to deal with client intake via phone
AIDS CT RRH Report Role	Role designed for AIDS CT Rapid Rehousing reporting
Coordinated Access - Network	Coordinated Entry: Primary role used by Coordinated Access Network hubs to facility enrollment and case management by the CAN
DMHAS / DDAP	Used for DMHAS and DDaP programs that must output the DDaP export
Runaway Homeless Youth (RHY)	Used for Runaway Homeless Youth programs
BOS Document Review (HV)	Balance of State's role to review documents in an efficient manner
CT View Only	Read-Only role used for several audiences to review client level data for auditing and outreach purposes
Organization Administration	Role designed for Organization administration that limits access for level 1 support staff
DMHAS - Limited Reporting	This role contains reports that have a limited cross-organization scope
Dev Testing	Development role for internal testing and beta testers of new features
Nutmeg Staff	Role that features tools and access designed for Nutmeg Staff to support the CT HMIS CaseWorthy platform
ODFC - Limited Reporting	This role contains reports that have a limited cross-organization scope
CHN VIEW ONLY	View Only role with custom reports
CHN VIEW ONLY – Reporting	View Only role with custom reports (larger dataset)

Password Reset	Dedicated support role for level 1 helpdesk staff to reset user passwords
DMHAS PATH Street Outreach	Used for DMHAS programs with PATH reporting requirements
DEMO ROLE	Used for demonstration purposes
Dev Testing - Reports	Development role for internal testing and beta testers of new reports
Greater Hartford Limited Reporting Role	This role contains reports that have a limited cross-organization scope
CSV Import - Organization	Role that allows organizations to control imports into the CaseWorthy system from a HUD CSV file

Internal Administration Custom Tools

Customization Name	Description / History
User Tools > All Users	Custom view to list all users in system, instead of by organization, optimized by export
User Tools > MFA / Contact History Log	Ability to see changes in contact email/phone for troubleshooting MFA problems
User Tools > User by Role (View/Export)	All user by Role - Supports multiple roles
User Tools > User by Provider (View/Export)	All users by Provider
User Tools > Users w/Approval Groups	List of users and their associated approval groups for the approval feature
User Tools > User Contact List Export	User list, formatted to include contact details
User Tools > Case Notes Created by User	Case notes, filterable by user creating
User Tools > Data Warehouse Users	Users who are marked as have data warehouse access
User Tools > User Web Stats	Statistics on user's web browser, OS, etc., filterable by user, useful for troubleshooting
User Tools > User Form Activity Report	Activity on forms of users, searchable audit view
User Tools > Who Changed This User	Audit view on the user record
Nutmeg Admin Tools > General > Get Form Field Use	Displays where a specific field is used on various forms across the system
Nutmeg Admin Tools > General > Account Balance Adjustment Tool	Used to make small adjustments in account balances in certain situations
Nutmeg Admin Tools > General > Saved Report EDIT Tool	Used to create or edit a report's saved parameters for each user in the system
Nutmeg Admin Tools > General > SPM - Edit Programs Tool	Custom SPM tool to optimize editing of program assessments in bulk for SPM reporting
Nutmeg Admin Tools > Report URLs	Log of report URLs and their parameters, used for troubleshooting and report recreation
(Uncategorized) Client FormIDs (Security)	Method to handle security per-form in the system
(Uncategorized) HDC Users Email - Exclusion List	Method to exclude certain users from receiving our automated HDC report
User Tools > LSA Tools > Duplicate Entry/Exit Assessment Finder	Cleanup tool for duplicate assessments, which are rarely created, usually due to user error
User Tools > LSA Tools > Delete Clients - INSTANT	Non-nightly instant method for deleting a client without table locks
User Tools > LSA Tools > Delete Clients - Mass Delete	Mass delete of client records (use with caution, audited and nightly run)
User Tools > LSA Tools > Workflow Instances	List of all users workflow instances in the system, these are paused workflows that have not been completed

User Tools > LSA Tools > Assessment Table Delete (ALL)	Custom cleanup tool for assessment management, designed for LSA submission
User Tools > LSA Tools > Slot Cleanup Mass Edit (ALL)	Custom cleanup tool for managing bed slots, designed for LSA submission
User Tools > LSA Tools > Enrollment Table	Custom cleanup tool for enrollment and enrollment member records, designed for LSA submission
User Tools > LSA Tools > Outcome Delete	Custom cleanup tool for outcome management, designed for LSA submission
Documentation Tools > Roles Export (View/Export)	Exports a list of the roles in the system in 3 formats, useful for documentation and system audits
Documentation Tools > Performance Measure Form/Report Inclusion	Tool to audit the system performance report setup
Documentation Tools > Menu and Navigation	Searchable index of all menus and navigation in system, including left menu, dashboards, assessments and forms
Documentation Tools > Form History Change Log	Searchable change-log of the form specific change system provided by CaseWorthy, custom view used to pick out important changes from minor edits made during testing
Documentation Tools > HUD Picklist Cross Mapping	Mapping document, used for report debugging
Documentation Tools > "At a Glance" - Help Text	This powers our "At a Glance" user facing feature's built-in context help.
Documentation Tools > Org System Report Exclusion	Method to exclude organizations from some reports
Documentation Tools > HMIS Project Type Picklist	Lists out the HMIS project types in various formats for ease of documentation creation and auditing
Documentation Tools > HUD SUB-Project Type Picklist	Lists out the project custom subtypes in various formats for ease of documentation creation and auditing
Documentation Tools > Client Data Change Log	Client data level change log, searchable and filterable
Program Setup Tools > Program Setup Script v2	Complex tool for setting up programs in a bulk manner, uses several forms, custom stored procedures, template programs (hundreds) and service templates
Program Setup Tools > Create Template Program	Form and stored procedures to create a template program
Program Setup Tools > Duplicate Program	Form and stored procedures to duplicate a program and all its related HMIS settings
Program Setup Tools > Template Program List	View of all template programs in the system
Program Setup Tools > Program List Export View	Custom formatted export of all programs and their important HMIS and program specific settings
Program Setup Tools > Assessment Usage Audit Tool	Displays the usage of assessments on the program's setup and allows searching/filtering across multiple programs
Bedlist Enrollment / Resource Tools > Master ResourceUsageEnroll	Tool to edit the MasterResourceUsageEnroll record for bedlists and appointment systems

System Wide Managers > Master Assessment Manager	Tool for support staff to detect issues with assessments for client records
MFA Settings > Nutmeg System Preferences	Enhanced control of the MFA process, used when the SMS provider is having issues or the email services provider is having issues
Training Tools > Change Training User Password	Control for setting of bulk training accounts passwords
Setup > Funding Partner Programs and Components (CTHMIS)	Tool to add custom non-HUD funding partners
Setup > Programs (CTHMIS)	Custom provider/program list and controls