

HMIS Data Integrations Policy

OVERVIEW

This document outlines the policies and procedures around integration with HMIS within The Way Home Continuum of Care (CoC). It is different from the [HMIS Data Sharing Policy](#) because it does not govern what data is shared, but rather how data is shared and what processes must be followed to create an integration.

For all integrations mentioned below, please contact hmis@cfthhouston.org for an initial discussion. The options mentioned below are not guaranteed, and CFTH will retain the right to decline integrations if they do not benefit the HMIS or The Way Home CoC.

IMPORT POLICY

As noted in The Way Home CoC's policy, all federally funded CoC Projects must enter its project-specific data (Clients, Enrollments, PDDEs, etc.) directly into the HMIS system. To ensure data quality, comply with HUD requirements, and facilitate Coordinated Entry evaluation, Agencies are not allowed to import the data through any other means.

Exceptions to the policy:

For projects that are not federally funded or are unable to perform their own data entry, CFTH may consider an import integration. Additionally, other non-project-specific data that is not governed by the HMIS Data Standards may also be open for an import integration and discussion.

Specific factors or criteria may be applied in CFTH's decision to integrate.

EXPORT POLICY

Partner organizations have the ability to export their data using the HMIS CSV standard. For datasets that could include data not entered by the partner, some level of aggregation or masking PII must be applied, and CFTH may decline the integration.

TABULAR DATASETS

This section describes options for exporting a tabular dataset with columns and rows.

HMIS CSV 2026

Dataset exports of the standard HMIS CSV 2026 for your organization's project(s) are currently supported to the following destinations:

- SFTP Server
- API POST
- Azure Storage Account

- If another destination is required, a meeting should be scheduled to discuss feasibility.

The HMIS CSV 2026 dataset may be delivered as:

- An executable (.exe) file, that is password protected. When run, input the password to extract the dataset. This protection is offered by CFTH's HMIS software, ClientTrack.
- A .zip file that is not password protected.

Hash PII:

- The HMIS CSV 2026 dataset may be generated with PII (personally identifiable information) hashed or not hashed. CFTH recommends using ClientTrack's executable password protection or PGP encryption when the unhashed version is sent.

CUSTOM QUERIES

Data exports of a custom query dataset are also available to the following destinations:

- SFTP Server
- API POST
- Azure Storage Account

Configuring a custom query for export takes time to set up in the system. Please plan for 3-4 weeks of lead time.

ENCRYPTION

PGP encryption of data is available on request. You will need to provide a Public PGP Key for use.

API POLICY

CFTH has several requirements for creating new API Integrations or connecting to existing APIs hosted by CFTH. This section applies to both import and export.

AUTHENTICATION

The software system calling CFTH's APIs must be able to set custom HTTP headers on its requests to provide authentication information. The authentication information must be securely stored in the calling software system.

DETAILED DESIGNS

In the event of a new API Integration, CFTH and the integration partner will create detailed designs documenting the HTTP methods, response codes, JSON payloads and overall

behavior. Required integration meetings will include reviewing the designs and agreement on final drafts.

API VERSIONING

CFTH will work with the designated partner support contact to communicate changes to APIs that may be released in future API versions. At least 1 (one) month of lead time will be given before new versions are released.

PLANNING, CONTRACT, AND DESIGN

For both import and export integrations, the following planning meetings and processes will be requested:

- Initial discussion meetings
 - Discovery
 - This meeting will be for establishing the goals of the integration, the direction(s) of the data, and any nuances present.
 - CFTH may decline the integration during or after this meeting.
 - Proposal
 - CFTH will provide formal approval to proceed with the integration.
 - CFTH will present a proposal of the scope, hours, and cost to set up and test the integration. The integration partner will have time to consider the estimate beyond this meeting and decide on moving forward or not.
- Contract
 - If the integration partner wants to move forward, prior to design a contract will be signed by both parties that captures the agreed upon hours, cost, and scope of the integration.
- Design
 - One or more meetings will be held to refine the details of the integration. It will include defining the dataset and sharing any additional configuration around sending or receiving the data (SFTP server information, PGP Key, etc.)
 - A contact tree will be established to address future issues.
 - Documentation will be created after these meetings capturing the dataset, configuration, and support contacts.

DEVELOPMENT, TESTING, AND GO-LIVE

The process to develop and test the new integration will proceed as follows:

- Development
 - The integration will initially be built out in CFTH's development environment.
 - CFTH will configure test data in the development system for an export or configure anything needed to prepare for an import.

- CFTH and the integration partner will discuss and agree on the criteria for a successful test of the integration. Additionally, incomplete data transfer or other failure cases will be discussed.
- A test case document will be created defining the above.
- Testing
 - All test cases defined will first be tested in CFTH's development environment.
 - For an export, the integration partner will provide details on the destination (partner's development, testing, or production site).
 - For an import, the integration partner will initially send either fake (test) data from their production environment, or test data from a lower environment such as development. This is to ensure CFTH is keeping its production environment as clean as possible.
 - Both CFTH and the integration partner will work together to troubleshoot issues that arise.
 - Once a full successful set of test cases has been completed in development, the integration will be promoted to production by both CFTH and the integration partner but configured to be off / not running.
 - A live production test will be conducted using CFTH's production environment and the integration partner's production environment, using real production data.
- Go-Live
 - Once a successful production test has been completed, the integration may be scheduled to run automatically.
 - The go-live date will be agreed on by CFTH and the integration partner.

COST

Prior to going live, CFTH will charge a rate of \$80/hour only for time spent on the following:

- 1-Hour Design meetings (no cost for initial discussion meetings or contracting)
- Creating documentation
- Setting up data or configuration
- Writing code or deploying software
- Troubleshooting issues during testing

POST GO-LIVE ISSUES

There is no charge for troubleshooting or ad hoc assistance after go-live up to the point of diagnosing the issue. If the problem is the responsibility of the partner to resolve, there will continue to be no charge for 5 (five) business days to allow for resolution; after which, CFTH will charge the rate above for any further troubleshooting and assistance needed until resolution.

SUPPORT

When CFTH is aware of integration issues CFTH will when possible and in proportion to the concern perform an initial investigation within two business days. CFTH will reach out to



the designated support contacts at the integration partner organization to determine next steps. For non-emergency support, integration partners may email hmis@cfthhouston.org.