



# **HMIS STANDARD REPORTING TERMINOLOGY GLOSSARY**

*A reference guide for methods of selecting clients and data used  
commonly in HMIS-generated reports*

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## Introduction

HUD's Office of Special Needs Assistance Programs (SNAPs), through the HMIS Data Lab, facilitated a group of Homeless Management Information System Vendors, who collaboratively met over a five-month period in 2013, to draft this HMIS Standard Reporting Terminology Glossary, henceforth referred to as the Glossary. This remarkable achievement of cooperation allowed vendors to put into words the logic and language required to produce reports required by HUD and the Federal Partners. The Glossary was originally created by HMIS Vendors, for HMIS Vendors, and has been updated with changes in data standards since then.

This document is not intended to be a guidebook instructing communities as to what they must collect or need to do. Rather, the Glossary is designed to provide HMIS systems, and their programmers, a foundation upon which they can best program HMIS-required reports.

The Glossary is the standard reporting document across different HMIS implementations for HUD. This benefits the HMIS Vendors, who can generate and reuse stored procedures or queries based on the Glossary entries. This benefits the report authors by clearly defining and providing programming logic for common terms. Finally, by establishing the Glossary as the standard, HUD and the Federal Partners are able to utilize accepted methodologies that have been well vetted when creating report, they wish to have programmed in an HMIS.

The Glossary serves as a reference to the programming specifications released by HUD and the Federal Partners for the vendors. Programmers across HMIS systems will be expected to use the logic, terminology, and instructions found within the Glossary, unless otherwise advised in the report specifications issued by HUD or the Federal Partners. When a programming specification references the Glossary, the notation uses the initials HG (HMIS Glossary) and the section name (Active Client, Bed Night, etc.). For example, when a report specification uses the programming logic found within the Glossary to determine which clients are leavers or stayers, the specification will use "HG Leaver and Stayer" to indicate reliance upon the Glossary entry on that subject. If a report specification deviates from the Glossary, it will be clearly noted in any specifications issued by HUD.

At a minimum, each entry within the glossary will include the title of the entry, a table indicating HMIS Data Standards and Non-HMIS Data Standards Fields, a description of the entry and a text box containing the agreed upon logic required to accurately report upon the data. Where further explanation is necessary, detailed instructions are provided to ensure a thorough understanding of the topics presented in this document.

## Revision History

Date	Version	Description
1/2022	1	<ul style="list-style-type: none"> <li>Removed all references to FY 2020 and prior data standards versions throughout the document. Updated data element terminology to align with FY 2022 Data Standards.</li> <li>Updated references to “contact” as “current living situation” whenever the specific 4.12 data element is referenced.</li> <li>Added <a href="#">[project exit date]</a> as an indicator of an active client in Method 2 – Active Clients by Date of Service and updated guidance accordingly.</li> <li>Added definition of youth that was previously only in APR/CAPER Programming Specifications.</li> <li>Added Gender programming instructions</li> <li>Clarified that when determining a leaver or stayer, some reporting instructions may specifically detail how to determine a leaver or stayer and those instructions override the Glossary instructions.</li> <li>Correct typo in SSN DQ error count instructions in Q2. “The second group/4<sup>th</sup> and 5<sup>th</sup> digits cannot be “00”.</li> <li>Added additional programming instruction for DQ error count instructions for date of birth in Q2.</li> <li>Add Appendix A with recommendations for handling import and export data quality issues.</li> </ul>

## Definitions

Unless otherwise noted, this document was written using the language of the current version of the HMIS Data Standards along with key terms that software providers normally use and understand. For the purposes of this document the following definitions apply:

**Project** – A project is identified by the CoC as part of its service system, in which an individual client or family is enrolled. A project further defined as a “lodging project” provides overnight accommodations and meets the needs of people who are homeless. A “services project” does not provide lodging and meets specific needs of people who are homeless or at risk of homelessness.

**Program** – A program refers to the federal funding source used to fund a project. One project may have simply one funding source or multiple sources.

**Report date range** – The start and end date of a specific reporting period. Because many reports can be executed for a date range other than one year, “report date range” is more flexible than the term “operating year” which is typically used for a HUD APR. The terms [\[report start date\]](#) and [\[report end date\]](#) are used throughout this document to refer to the user-supplied dates for a specific instance of a report execution.

## Active Clients

### HMIS Data Standards fields referenced (2.02, 3.10, 3.11, 3.20, 4.12, 4.14, W1, P1, R14, V2)

- [\[project information\]](#) (2.02)
- [\[project start date\]](#) (3.10)
- [\[project exit date\]](#) (3.11)

- [housing move-in date] (3.20)
- [current living situation] (4.12)
- [bed night date] (4.14)
- [services provided – date of service] (W1, P1, R14, V2)

“Active clients” refers to people who have received services from a specific project in a given date range, for inclusion into the universe of clients for a particular reporting question. “Services received” may refer to actually being housed in the case of a housing or shelter project, in which case such housing may be indicated by the client’s project start and exit dates (Method 1 below).

In the case of other services-only or night-by-night type projects, the existence of a specific type of service data including bed nights, current living situations, or services dated within the report date range and attached to the client record indicates an active client (Method 2 below).

Specific HMIS reports, e.g. the APR or CE-APR, will indicate the method of choosing clients for the report. The specifications in this document are intended to serve as a common reference point but specific report instructions can supersede these.

### Method 1 - Active Clients by Start/Exit

The default method of determining an active client is based on the client’s [project start date], [project exit date], and the date range of the report. The logic below selects active clients according to these parameters.

```
[project start date] <= [report end date]
and
( [project exit date] is null or [project exit date] >= [report start date] )
```

### Method 2 - Active Clients by Date of Service

Some projects have less formal project start and exit dates, for example a shelter which houses persons on a night-by-night basis or a medical services-only project. These projects often enter clients upon first service but may not exit clients from the project or exit them (manually or automatically) after a period of inactivity.

These projects should use other data in a client’s record to determine who was served in a given date range. In the case of night-by-night shelters, this would be a “bed night” form attached to a client’s record or other indicator of the provision of a bed for the night. In the case of a medical project, this might be a form detailing what medical services were delivered on a particular day. In the case of a street outreach project, this would be a current living situation form attached to a client’s record or some other indicator of a contact. In any event, this form must have the date of service.

In addition to the date of service, method 2 should also include the [project exit date] as an indicator of an active client. For example, if a night-by-night shelter correctly exits a client on the date after their last bed night, and a particular [report start date] begins on that date after their last bed night, then the client can correctly be reported as a leaver. Otherwise, because the exit date is not within the prior year’s reporting range, the client will never be reported as a leaver in either reporting range.

Projects using Method 2 must include Method 1 as a starting basis, then apply additional filtering based on [services provided – date of service], [services provided – bed night date], [services provided – current living situation] or whatever other date or dates is/are consistently used by the given project to determine services provided. For consistency in reporting, these dates of service must also fall within the confines of the client’s start and exit dates. Each specific report will designate which services are applicable.

The logic below selects active clients according to the existence of services dated in the report range and attached to the client record. Comments in green are a summary of the code immediately below.

```
(
    /* The exit date is in the date range, regardless of any service records attached to that enrollment. */
    [project exit date] >= [report start date] and [project exit date] <= [report end date]
)
or (
    /* The client entered before the end of the report range and has not yet exited,
    or has exited in the future relative to the report range and there is a service in the report range. */
    [project start date] <= [report end date]
    and
    ( [project exit date] is null or [project exit date] > [report end date] )
    and
    [date of service] >= [report start date]
    and
    [date of service] <= [report end date]
    and
    [date of service] >= [project start date]
)
```

### Method 3 – Active Clients in Residence

Some reports may require that a client be in residence at a project to be active. This could apply to any type of residential project such as shelter, transitional housing, or any kind of permanent housing.

```
[project start date] <= [report end date]
and
( [project exit date] is null or [project exit date] > [report start date] )
and (
    (
        [project type] = 1
        and
        [method for tracking emergency shelter utilization] = 3
        and
        [date of bed night] >= [report start date]
        and
        [date of bed night] <= [report end date]
        and
        [date of bed night] >= [project start date]
        and
        ( [date of bed night] < [project exit date] or [project exit date] is null )
    )
    or
    (
        [project type] = 1
        and
        [method for tracking emergency shelter utilization] = 0
    )
    or
    (
        [project type] = 2, 8
    )
    or
    (
        [project type] = 3, 9, 10, 13
        and
        [housing move-in date] <= [report end date]
    )
)
```

```

and
[housing move-in date] >= [project start date]
and
( [housing move-in date] < [project exit date] or [project exit date] is null )
)

```

## Method 4 – Active Clients by Post-Exit Services

Some reports may incorporate data recorded about clients *after* the client’s [project exit date], i.e. [data collection stage] = 6. In this case the client may have already exited prior to the [report start date], so the determination is:

```

[data collection stage] = 6
and
[date of service] >= [report start date]
and
[date of service] <= [report end date]

```

## Bed Night and Length of Stay in Residence

### HMIS Data Standards fields referenced (2.02, 3.10, 3.11, 3.20, 4.14)

- [project information] (2.02)
- [project start date] (3.10)
- [project exit date] (3.11)
- [housing move-in date] (3.20)
- [bed night date] (4.14)

“Bed night” refers to a unit of service where a client is residing overnight in any type of lodging project, e.g. emergency shelter, transitional housing, or permanent housing. Counting bed nights varies based on the [project type] and [emergency shelter tracking method], as described below.

Use the method below appropriate for the project type being reported on.

### Method 1 – Using Start/Exit Dates

Use when ( [project type] = 1 and [emergency shelter tracking method] = 0 ) Or ( [project type] = 2 or 8 ).

```

Bed nights = [minimum of ( [project exit date], [report end date] + 1 ) ]
              – [maximum of ( [project start date], [report start date] ) ]

```

Remove [report start date] from above formula if the count of bed nights extends prior to the report date range, i.e. determining Length of Stay from the beginning of the client’s stay in the project.

### Method 2 – Using Bed Night Dates for Night-by-Night Shelters

Use when ( [project type] = 1 and [emergency shelter tracking method] = 3 ).

```

[bed night date] must be:
>= [project start date]
and < [project exit date] or [project exit date] is null
and >= [report start date]
and <= [report end date]

```



An individual person's bed nights should be a unique count of the relevant dates. If a client has more than one bed night recorded on the same date that date is only counted once. Note that while the [\[project exit date\]](#) is used for determining active clients, it shouldn't be counted as a bed night.

Remove (and >= [\[report start date\]](#)) from above formula if the count of bed nights extends prior to the report date range, i.e. when determining Length of Stay.

### Method 3 – Using Housing Move-In Date for PH projects

Use when ( [\[project type\]](#) = 3, 9, 10, 13 ).

$$\text{Bed nights} = \left[ \text{minimum of ( [project exit date], [report end date] + 1 )} \right] - \left[ \text{maximum of ( [housing move-in date], [report start date] )} \right]$$

Remove [\[report start date\]](#) from above formula if the count of bed nights extends prior to the report date range, i.e. determining Length of Stay from the beginning of the client's stay in the project.

### Length of Stay in Project

Some reports need to know the length of time a client was in a residential project separate from the bed nights the client had in that project. Use the table below in conjunction with the Bed Night and Length of Stay in Residence calculation to determine Length of Stay in Project.

Project type	Bed Night and Length of Stay method
( <a href="#">[project type]</a> = 1 and <a href="#">[tracking method]</a> = 0 ) or ( <a href="#">[project type]</a> = 2, 4, 6, 7, 8, 11, 12, 14 )	Method 1
( <a href="#">[project type]</a> = 1 and <a href="#">[tracking method]</a> = 3 )	Method 2
( <a href="#">[project type]</a> = 3, 9, 10, 13 )	Method 1 or 3, depending on report question

### Chronic Homelessness Status<sup>1</sup>

**HMIS Data Standards fields referenced (2.02, 3.08, 3.10, 3.917, 4.12, 4.05, 4.06, 4.07, 4.08, 4.09, 4.10)**

- [\[project information\]](#) (2.02)
- [\[project start date\]](#) (3.10)
- [\[prior living situation\]](#) (3.917)
- [\[disabling condition\]](#) (3.08)
- [\[current living situation\]](#) (4.12)
- [\[physical disability\]](#) (4.05)
- [\[developmental disability\]](#) (4.06)
- [\[chronic health condition\]](#) (4.07)
- [\[HIV/AIDS\]](#) (4.08)
- [\[mental health disorder\]](#) (4.09)

<sup>1</sup> [Defining Chronically Homeless Final Rule](#)

- [\[substance use disorder\]](#) (4.10)

## Overview

The HMIS Data Standards specify that data entry in [\[prior living situation\]](#) requires some type of dependent fields such that fields used in determining CH are only answerable under certain conditions. The fields must be examined in a specific sequence to know whether a client is definitely chronically homeless, definitely *not* CH, or if the CH status is don't know/refused or unknown due to incomplete data.

## Disabling Condition

The Data Standards allow systems to auto populate the disabling condition field with “yes” when a client answers “Yes” (Dependent Field A = “Yes”) to one of the disability criteria data elements: Physical Disability, Chronic Health Condition, Mental Health Disorder, and/or Substance Use Disorder (4.05, 4.07, 4.09, 4.10), or if Developmental disability (4.06) or HIV/AIDS (4.08) = “Yes” (Field 2 = “Yes”). Reporting should always count these clients as having a Disabling Condition. Though the programming instructions below only directly reference [\[disabling condition\]](#), it is expected that this field is consistent with the auto-population option in the HMIS. So, for projects or systems where auto-population is *not* used, tests for each of the separate Dependent Field A for 4.05, 4.07, 4.09 and 4.10, as well as Field 2 for 4.06 and 4.08, must occur within the programming logic of each relevant question.

## CH at project start

All adults and heads of household have a chronic homelessness status at project start using their own data from that entry ([\[data collection stage\]](#) = 1).

## CH at project start because of other household members

The members of a household present at project start for the household as a whole (i.e. the earliest [\[project start date\]](#) of anyone in the household on a specific stay) can cause other household members present at start to be considered chronically homeless AND cause the household as a whole to be considered CH. The CH status of the household cannot change by the addition of household members after the household start date.

*In cases where the head of household as well as all other adult household members have an indeterminate CH status (don't know, refused, missing), any child household members should carry the same CH status as the head of household.*

Note that reporting on clients' CH-at-start status in a specific report date range may require the examination of data on clients who were in the household but left prior to the report date range.

See examples below:

	Month in project							CH at entry	CH people reported	CH household reported
	1	2	3	4	5	6	7			
HH #1	John (HoH)							Yes	1	Y
HH #2	Sue (HoH)							Yes	2	Y
	Bob (adult)						Yes (because of Sue)			
HH #3	Jane (HoH)							No	1	N
	Billy (adult)						Yes (because of own data)			
	Joey (child)						No			
HH #4	Jane (HoH)							(not in report range)	0	N
	Billy (adult)						No (not present at HH entry)			
HH #5	Jane (HoH)							(not in report range)	1	Y
	Billy (adult)						Yes (because of Jane)			

Report range

### CH at a point-in-time

Individuals in street outreach, shelters, and safe havens ([project type] = 1, 4, or 8) may also have a “point-in-time” chronic homelessness status designed to include time spent from [project start date] up to a [point-in-time date] as time spent homeless. Reporting on point-in-time chronic homelessness for families and for other project types simply uses the client’s CH status at project start.

### CH at project start

For an adult or head of a household, use the table below to determine that person’s CH status at project start. In PH projects, even though a client’s CH status may technically have changed between [project start date] and [housing move-in-date], HUD has determined that [project start date] should be used for this purpose. Process data using each row from top to bottom, and within each row from left to right. Depending on the data, processing may stop on a particular row even though not all fields have been analyzed.

	Data Standards Field	Field Value / Decision	Field Value / Decision	Field Value / Decision	Field Value / Decision
1	[disabling condition] (3.08)	If 1 (yes), CONTINUE processing using 3.917A (line 3) or B (line 8) as appropriate.	If 0 (no), CH = NO. STOP processing.	If 8 or 9 then CH = DK/R. STOP processing	If 99 then CH = missing. STOP processing
2	3.917A				
3	[project type] (2.02.6)	If 1, 4 or 8, CONTINUE processing on line 4.			
4	[approximate date started] (3.917.3)	If <= [project start date] (3.10) – 365 days, CH = YES. STOP processing.	If missing or less than 365 days before [project start date], CONTINUE processing on line 5.		
5	[...number of times the client has been on the streets, in es, or sh...] (3.917.4)	If four or more times, CONTINUE processing on line 6.	If 1, 2, or 3 times, CH = NO. STOP processing.	If 8 or 9 then CH = DK/R. STOP processing	If 99 then CH = missing. STOP processing
6	[total number of months homeless...] (3.917.5)	If >= 12, CH = YES. STOP processing.	If 1 to 11 months, CH = NO. STOP processing.	If 8 or 9 then CH = DK/R. STOP processing	If 99 then CH = missing. STOP processing
7	3.917B				
8	3.917B: Homeless Situation:				
9	[prior living situation] (3.917.1)	If 16, 1, 18, CONTINUE processing on line 10.			
10	[approximate date started] (3.917.3)	If <= [project start date] (3.10) – 365 days, CH = YES. STOP processing.	If missing or less than 365 days before [project start date], CONTINUE processing on line 11.		

	Data Standards Field	Field Value / Decision	Field Value / Decision	Field Value / Decision	Field Value / Decision
11	[...number of times the client has been on the streets, in es, or sh...] (3.917.4)	If four or more times, CONTINUE processing on line 12.	If 1, 2, or 3 times, CH = NO. STOP processing.	If 8 or 9 then CH = DK/R. STOP processing.	If 99 then CH = missing. STOP processing.
12	[total number of months homeless...] (3.917.5)	If >= 12, CH = YES. STOP processing.	If 1 to 11 months, CH = NO. STOP processing.	If 8 or 9 then CH = DK/R. STOP processing.	If 99 then CH = missing. STOP processing.
13	3.917B: Institutional Situation:				
14	[prior living situation] (3.917.1)	If 15, 6, 7, 25, 4, 5, CONTINUE processing on line 15.			
15	[did you stay less than 90 days?] (3.917.2A)	If 1 (yes), CONTINUE processing on line 16.	If 0 (no), CH = NO. STOP processing.	(DK/R not in Data Dictionary)	
16	[On the night before did you stay on the streets, ES or SH] (3.917.2C)	If 1 (yes), CONTINUE processing on line 17.	If 0 (no), CH = NO. STOP processing.	(DK/R not in Data Dictionary)	
17	[approximate date started] (3.917.3)	If <= [project start date] (3.10) – 365 days, CH = YES. STOP processing.	If missing or less than 365 days before [project start date], CONTINUE processing on line 18.		
18	[...number of times the client has been on the streets, in es, or sh...] (3.917.4)	If four or more times, CONTINUE processing on line 19.	If 1, 2, or 3 times, CH = NO. STOP processing.	If 8 or 9 then CH = DK/R. STOP processing.	If 99 then CH = missing. STOP processing.
19	[total number of months homeless...] (3.917.5)	If >= 12, CH = YES. STOP processing.	If 1 to 11 months, CH = NO. STOP processing.	If 8 or 9 then CH = DK/R. STOP processing.	If 99 then CH = missing. STOP processing.
20	3.917B: Temporary, Permanent, and other Situations:				
21	[prior living situation] (3.917.1)	If 29, 14, 2, 32, 36, 35, 28, 19, 3, 31, 33, 34, 10, 20, 21, 11, 8, 9, 99, CONTINUE processing on line 22.			
22	[did you stay less than 7 nights?] (3.917.2A)	If 1 (yes), CONTINUE processing on line 23.	If 0 (no), CH = NO. STOP processing.	DK/R not in Data Dictionary	
23	[On the night before did you stay on the streets, ES or SH] (3.917.2C)	If 1 (yes), CONTINUE processing on line 24.	If 0 (no), CH = NO. STOP processing.	DK/R not in Data Dictionary	
24	[approximate date started] (3.917.3)	If <= [project start date] (3.10) – 365 days, CH = YES. STOP processing.	If missing or less than 365 days before [project start date], CONTINUE processing on line 25.		
25	[...number of times the client has been on the streets, in es, or sh...] (3.917.4)	If four or more times, CONTINUE processing on line 26.	If 1, 2, or 3 times, CH = NO. STOP processing.	If 8 or 9 then CH = DK/R. STOP processing.	If 99 then CH = missing. STOP processing.
26	[total number of months homeless...] (3.917.5)	If >= 12, CH = YES. STOP processing.	If 1 to 11 months, CH = NO. STOP processing.	If 8 or 9 then CH = DK/R. STOP processing.	If 99 then CH = missing. STOP processing.

## CH at a point-in-time

Clients in projects *other than* street outreach, shelters, and safe havens may only have a chronic homelessness status at project start and cannot age into chronic homelessness by virtue of being in any of those projects.

Families presenting together as a household also have only a chronic homelessness status at project start and cannot age into chronic homelessness in any project type whatsoever.

Individuals in street outreach, shelters, and safe havens ([project type] = 1, 4, or 8) who may not have been considered chronically homeless at project start may be considered CH later because of their additional time active in that project. In addition to data from project start, an individual's chronic homeless status may also include disabling condition and special needs data entered subsequent to project start ([data collection stage] = 1, 2, 3, or 5) to the extent that data is available.

Each report (e.g. Point-In-Time for HIC) must specify the [point-in-time date] of the measurement. This may be a fixed date for all clients reported, or it may be a date relative to each client's record (e.g. [project exit date]). For each different data element in the calculation, use only the latest available data with an [information date] <= [point-in-time date] and <= [project exit date].

In order to include time spent in a project towards a client’s total time spent homeless, it’s first necessary to determine the number of months the client was homeless immediately prior to starting in the project:

[months homeless prior to start] = the number of months covered between [approximate date started] and [project start date]

Use the “one day in a month counts the whole month” strategy when counting months. In other words, any portion of a month covered by this date range causes the entire month to be included. Set [months homeless prior to start] = 1 even if there is no data in [approximate date started]. See examples below.

### Entry-exit shelters

Calculate a client’s [months in project] by looking at the months covered in whole or in part from [project start date] up to and including the lesser of [point-in-time date] or the client’s [project exit date]. Count the entire month even if the client was present only on one day of that month. Subtract 1 from this number if the [project start date] does not fall on the first of the month. This is required so as not to count that particular month twice, since that month is already covered in [months homeless prior to start].

### Night-by-night emergency shelters ([emergency shelter tracking method] = 3)

Use the individual bed night dates to indicate in which months the client was homeless.

Bed night [information date] >= [project start date]  
 and [information date] < [project exit date]  
 and [information date] <= [point-in-time date]  
 and [information date] > month indicated in [project start date]

### Street outreach projects

Use the [current living situation] (4.12) where the client was on the streets, in shelter, or safe haven to indicate in which months the client was homeless. Because of the last criteria – the contact location – dates of engagement do not count as a client contact for this purpose.

Current Living Situation [information date] >= [project start date]  
 and [information date] < [project exit date]  
 and [information date] <= [point-in-time date]  
 and [information date] > month indicated in [project start date]  
 and [location of contact] = 16, 1, 18 (Place not meant for habitation, Emergency Shelter, Safe Haven)

### [Months in project] Examples

In a project using start/exit dates, a client comes in January 31<sup>st</sup>, 2018, and leaves March 2<sup>nd</sup>, 2018. The client answered “4/30/2017” for the approximate date she became homeless. The [months homeless prior to start] = 10 (April through January 2018). The [months in project] = 2 (February and March – January is excluded since it was already counted).

In a project using a night-by-night method, a client has a [project start date] of January 31<sup>st</sup>, 2018, the client’s first bed night attached to that project stay is also 1/31/2018 with a second bed night on 3/1/2018. He also answered “4/30/2017” for the [approximate date started]. The [months homeless prior to start] = 10, and [months in project] = 1 (January is excluded, no bed night in February, and one bed night in March).

Data Standards Field / Variable	Field Value / Decision	Field Value / Decision	Field Value / Decision	Field Value / Decision
---------------------------------	------------------------	------------------------	------------------------	------------------------

	Data Standards Field / Variable	Field Value / Decision	Field Value / Decision	Field Value / Decision	Field Value / Decision
1	[disabling condition] (3.08)	If 1 (yes), <b>CONTINUE</b> processing using 3.917A (line 3) or B (line 8) as appropriate.	If 0 (no), CH = NO. <b>STOP</b> processing.	If 8 or 9 then CH = DK/R. <b>STOP</b> processing.	If 99 then CH = missing. <b>STOP</b> processing.
2	[months homeless prior to start] + [months in project]	If >= 12, CH = YES. <b>STOP</b> processing.	If < 12, <b>CONTINUE</b> processing on line 3.		
3	[...number of times the client has been on the streets, in es, or sh...] (3.917.4)	If four or more times, <b>CONTINUE</b> processing on line 4.	If 1, 2, or 3 times, CH = NO. <b>STOP</b> processing.	If 8 or 9 then CH = DK/R. <b>STOP</b> processing.	If 99 then CH = missing. <b>STOP</b> processing.
4	[total number of months homeless...] (3.917.5)	If >= 12, CH = YES. <b>STOP</b> processing.	If 1 to 11 months, <b>CONTINUE</b> processing on line 5.	If 8 or 9 then CH = DK/R. <b>STOP</b> processing.	If 99 then CH = missing. <b>STOP</b> processing.
5	[total number of months homeless...] (3.917.5) + [months in project]	If >= 12, CH = YES. <b>STOP</b> processing.	If < 12, CH = NO. <b>STOP</b> processing.		

## Contact

### HMIS Data Standards fields referenced (3.10, 3.11, 4.12)

- [project start date] (3.10)
- [project exit date] (3.11)
- [current living situation] (4.12)

An interaction between a street outreach worker (or other project type requiring a contact) and a client is recorded in the [Current Living Situation]. Each time the outreach worker contacts a client, a record of that contact is documented using the [Current Living Situation] element in HMIS, including where the contact occurred.

A client may have more than one contact on a given date. Each contact documented by the [Current Living Situation] should be included in the count when counting contacts within a given date range unless instructed differently in specific report instructions.

```
[project start date] <= [report end date]
and
([project exit date] is null or [project exit date] >= [report start date] )
and
(
[date of current living situation] >= [report start date] and [date of current living situation] <= [report end date]
and [date of current living situation] >= [project start date] and ( [date of current living situation] <= [project exit date] or
[project exit date] is null)
)
```

A given report may specify that the client's contact dates recorded in [current living situation] fall between the client's project start and exit dates. If so, the italicized lines above also apply. If no such specification exists, ignore the italicized lines.

## Age

### HMIS Data Standards fields referenced (3.03, 3.10)

- [date of birth] (3.03)
- [date of birth data quality] (3.03)
- [project start date] (3.10)

A client's age is defined as of [project start date] or [report start date], whichever is greater. If the client is already in the project as of the [report start date], use the client's age on that date. If the client started in the project after the [report start date], use the client's age as of project start.

If a report includes data from multiple project stays for the same client, the client's age for the report should be as of the latest [project start date] or [report start date], whichever is greater.

If [project start date] <= [report start date] Then Age = [report start date] – [date of birth] Else Age = [project start date] – [date of birth]
--

Adult = any client with an age of 18 or over.

Child = any client under the age 18.

The [date of birth data quality] field should be used to determine a client's age category in the event [date of birth] is blank or a system default.

## Youth

The determination of a particular client being "youth" requires knowing who else is present with a client in the household at a project for a specific report date range. Using "age" as determined above,

Youth = any client age >= 12 and <= 24 provided that not one household member is above that age range. Note that clients in the household with an unknown age do not impact the determination of "youth".

## Gender

### HMIS Data Standards fields referenced (3.06)

- [Gender] 5.09

Because Gender is a multi-response field (more than one response applies to a client), the table below provides a standard way to report clients, grouped according to the responses on their record.

	A	Z
1	<b>Category</b>	<b>Data Standards Response options</b>
2	Male	1
3	Female	0
4	No Single Gender	0,1 0,1,4 0,1,4,5 0,1,5 0,4 0,4,5 1,4 1,4,5 4 4,5
5	Questioning	0,1,4,5,6 0,1,4,6 0,1,5,6 0,1,6 0,4,5,6 0,4,6 0,5,6 0,6 1,4,5,6 1,4,6 1,5,6 1,6 4,5,6 4,6 5,6 6
6	Transgender	0,5 1,5 5
7	Client Doesn't Know/Client Refused	8 or 9
8	Data Not Collected	99
9	<b>Total</b>	=sum of rows 2 through 8

**Programming Instructions:**

1. Each client must be reported on one and only one row.
2. Use column Z to determine on which row to report a client. Because [gender] is a multi-response field, clients are reported according to sets of selected responses. These sets are shown in column Z must exactly match those selected for the client record, for example:
  - a. Row 2 reports clients with *only* "male" indicated in their data with no other gender responses.
  - b. Row 6 reports clients with *only* the combinations (0,5), (1,5), or simply 5.
3. Note that the header text in row 4 is abbreviated from the full Data Standards response.
4. As specified in the Data Standards, responses 8, 9 and 99 are only valid when no other response is indicated.



## Date of Engagement

### HMIS Data Standards fields referenced (3.10, 3.11, 4.13)

- [project start date] (3.10)
- [project exit date] (3.11)
- [date of engagement] (4.13)

[Date of Engagement] is the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan. It is when the engagement date is recorded that data quality starts. Engagement date may be the same date as [project start date] or a [current living situation] date.

Projects should only be able to record one date of engagement for each client.

To generate a count of clients with a date of engagement in a given report date range:

```
[project start date] <= [report end date]
and ( [project exit date] is null or [project exit date] >= [report start date] )
and [date of engagement] >= [report start date]
and [date of engagement] <= [report end date]
and [date of engagement] >= [project start date]
and ( [date of engagement] <= [project exit date] or [project exit date] is null)
```

## Date of Enrollment

### HMIS Data Standards fields referenced (3.10, 3.11, P3)

- [project start date] (3.10)
- [project exit date] (3.11)
- [PATH Status] (P3)

“Date of Enrollment” is the date on which a client is enrolled into a PATH funded project, usually indicated by the client signing an enrollment form. Date of Enrollment may be the same date as [project start date], [current living situation] date, or [date of engagement]. Date of Enrollment is strictly a PATH program element.

PATH projects should only be able to record one date of enrollment for each client per project stay.

Using PATH Status Element P3, a client is enrolled in PATH if the following is true:

```
[Date of Status Determination] is not null
and
[Client became enrolled in PATH] = Yes
```

If the client became enrolled in PATH, [date of status determination] is the [date of enrollment].

The Data Standards indicate the date of status determination is collected once at or before project exit.

To generate a count of clients who are enrolled in a given report date range:

```
[project start date] <= [report end date]
and [project exit date] is null or [project exit date] >= [report start date]
and [date of enrollment] >= [report start date]
and [date of enrollment] <= [report end date]
and [date of enrollment] >= [project start date]
and ( [date of enrollment] <= [project exit date] or [project exit date] is null)
```

# Household Types

## HMIS Data Standards fields referenced (5.09)

[household id] (5.09)

## Non-HMIS Data Standards fields referenced

[global variable: age]

“Household Types” are commonly utilized in reporting in order to provide meaningful information about the types of household configurations that are experiencing homelessness or accessing homeless prevention services. Households are defined as a single individual or group of persons who either currently live together in one dwelling unit or would live together in one dwelling unit were they able to maintain suitable housing accommodations. As such, a Household ID should be assigned to an individual or group of persons upon each project start. While individuals may legitimately be added or removed from the household over time due to changes in familial makeup, the household identifier will remain constant for that project stay.

A household type may be determined to be one of the following four (4) types:

- Household without Children
- Household with Children and Adults
- Household with Only Children
- Unknown Household Type

To determine a household type, reporting logic should utilize information from all active clients during the reporting period that share the same [household ID]. Reporting logic should utilize each clients’ age for the reporting period (see Global Variable: Age) to classify each client as an Adult (18 and over), a Child (under the age of 18), or Unknown Age (clients with an unspecified birth date).

The following logic should be applied in order:

If ever in the reporting period there is at least one active child and at least one active adult in the household, the household and all individuals should be categorized as “Household with Children and Adults”.

If ever in the reporting period there is at least one active adult, zero active children and zero active Unknown Age clients, the household and all individuals should be categorized as “Household without Children”.

If ever in the reporting period there is at least one active child, zero active adults and zero active Unknown Age clients, the household and all individuals should be categorized as “Household with Only Children”.

If ever in the reporting period none of the previous statements apply, then the household and all individuals should be categorized as an “Unknown Household Type”.

Household type	adults	children	unknown
a. Without children	> 0	0	0
b. With children and adults	> 0	> 0	n/a
c. With only children	0	> 0	0
d. Unknown household type	0	0	> 0
d. Unknown household type	0	> 0	> 0
d. Unknown household type	> 0	0	> 0

## Unduplicated Household Counts and Unduplicated Client Counts by Household Type

### HMIS Data Standards fields referenced

- [personal ID] (5.08)
- [household ID] (5.09)

- [\[relationship to head of household\]](#) (3.15)

For many reports, especially for longitudinal research, it is common to provide information on an unduplicated number of households and/or a count of clients by household attributes.

#### Unduplicated Household Counts

Unduplicated household counts should be determined by performing a distinct count of [\[personal IDs\]](#) of all heads of households (people who have [\[relationship to head of household\]](#) = Self) in the report range.

In the event that your system identifies people in the date range with no head of household, a flag to the system user may be in order, i.e. the head of household may have left the household and a new head of household may not have been assigned.

#### Unduplicated Household Counts by Individual Attribute

Some reports will report on unduplicated households broken out by attributes that can be collected for each household member such as destination or housing status. When this occurs, report the information recorded for the [\[personal ID\]](#) of the head of household (people who have [\[relationship to head of household\]](#) = Self) for the most recent head of household for that household.

#### Unduplicated Client Counts by Household Type

To provide a breakout of the number of clients by household type, reports should perform a distinct count of clients by their associated household type. Because it is possible that an active client may have been associated with more than one household during the reporting period, the sum of unduplicated clients by household type may exceed the total number of unduplicated clients.

## Project Leavers and Stayers

### HMIS Data Standards fields referenced (3.10, 3.11)

- [\[project start date\]](#) (3.10)
- [\[project exit date\]](#) (3.11)

The method of determining a leaver or stayer is based on the client's last project enrollment during the reporting period for the project(s) being reported on. Note that a particular HMIS report may specify which enrollment data to use across the entire report, which in turn affects the determination of leavers and stayers, or provide more specific instruction on the determination of leavers and stayers. Those report instructions should override these.

### Project Leavers

Leavers are persons who exited the project and are no longer enrolled in the project as of the last day of the reporting period.

[\[project exit date\]](#) >= [\[report start date\]](#)  
and [\[project exit date\]](#) <= [\[report end date\]](#)

### Project Stayers

Stayers are persons who are active in the project on the last day of the report date range. A stayer's project exit date is blank or populated with a date after the report end date. This would include a person who exited the project and re-started in the project before the report end date. If on the last day of the reporting period, the client does not have a project exit date, or the exit date is after the end of the reporting period the client is considered a stayer.

[\[project start date\]](#) <= [\[report end date\]](#)  
and  
( [\[project exit date\]](#) is null or [\[project exit date\]](#) > [\[report end date\]](#) )

## Annual Assessment

Reports utilizing Annual Assessment ([data collection stage] = 5) data on stayers in the project 365 days or more require data from the *specific* Annual Assessment on the head of household's anniversary most relevant to the [report date range]. The instructions below describe how to select this exact record for each client.

1. Use Length of Stay in Project when determining length of stay for this purpose.
2. In the event a household has more than one head of household active in the report range, i.e. if the first HoH exited and another household member became the HoH, use the later HoH's [project start date].
3. Calculate the head of household's number of years in the project. This can be done using the same algorithm as for calculating a client's age as of a certain date. Use the client's [project start date] and the [report end date] as the two dates of comparison. It is important to use the "age" method of determining client anniversaries due to leap years; using "one year = 365 days" will eventually incorrectly offset the calculated anniversaries of long-term stayers.
4. If the HoH's number of years in the project is 0, the household is not yet required to have an annual assessment. This is true even if the household as a whole has been in the project more than 1 year – annual assessments are based solely on the latest HoH's anniversary.
5. If the HoH's number of years in the project is more than 0, add that number to the year of the HoH's [project start date]. This becomes the household's relevant anniversary date for the purposes of the report. For example, using a report date range of 10/1/2017 – 9/30/2018, a HoH with a [project start date] of 6/1/2016 will have been in the project 2 years as of 9/30/2018 and so will have an [anniversary date] of 6/1/2018. I.e. 2016 + 2 = 2018.
6. Use the latest annual assessment ([data collection stage] = 5) for each client in the household dated between:
  - a. 30 days prior to the [anniversary date] (even if this date falls before the [report start date])
  - b. and the lesser of (30 days after the [anniversary date], [report end date])
7. If the household member's [project start date] is > [anniversary date] (i.e. the person entered the household after the annual assessment may have been collected), that person is not yet required to have an annual assessment.
8. Exclude any data with an [information date] > [report end date], even though it is legitimate for a client's relevant annual assessment data to fall in this date range for clients whose anniversaries are near to the end of the [report date range].
9. Clients with no annual assessment data in the relevant date range as indicated in step 6 may be reported as "missing annual assessment" or may be completely omitted depending on the report question.
10. Clients who aren't required to have an annual assessment yet as determined in steps 4 and 7 may be reported accordingly or may be completely omitted depending on the question.

# HMIS Data Quality Report

## **Purpose**

To update the data quality reporting for all of the CoC and ESG Program Data Quality reporting. Programming specifications are provided for this report as a part of the HMIS Reporting Glossary. Vendors are encouraged to program a printable report from their HMIS and then use a single or multiple table shells in other reporting applications without reprogramming. It is expected that all or parts of this report will be used in the CoC annual grant application (to discount system performance measures accordingly); Annual Performance Reports for CoC; and CAPER reports. Placing the code in the Glossary allows other federal partner projects to also adopt these tables or methods for their reporting purposes.

## **Report Date Range**

The user must be able to enter a start and end date for the report. The report must be able to be generated for any period of time the user selects (from one week to multiple years).

## **Output**

The report must be able to be filtered for one, some, or all projects to which the user running the report has HMIS access. Programmers must assume that the reports will be run by project level staff and by single project, companion projects, and by a system administrator on multiple projects of the same project type (e.g. all transitional housing projects in a community), or the entire CoC (for adjunct information for grant applications or system performance measurement).

Each section of the report must have a details mode output for users to identify the specific records included in the section which are generating errors.

## **Missing Data**

Each section refers to “information missing” for various elements. “Missing” is defined to mean data where the field has a value of 99 (“data not collected”), is null or blank, or where the entire form or table record on which that field resides is completely absent. For example: “Destination” resides in a table called “exits” alongside other exit-related fields. A client has exited a project but is completely missing a row in the “exits” table. Therefore “Destination” is considered missing along with whatever other HMIS fields might be in that table.

## **Project Stays to Include**

This report should use each relevant client’s *latest project stay only*. This allows counts and percentages in these Data Quality sections to match other numbers in reports such as the APR and CAPER.

For project stays in [project type] = 4, only count clients that have an [engagement date] prior to the [report end date]. Street outreach stays where the client is not engaged should be completely removed from the universe of data, i.e. apply this filter before determining each client’s latest stay.

## **Programming Instructions**

In general, any record with a value of Client doesn't know, Client refused, or where the information is missing (as described above) is included in the error count for the relevant field. For fields with data logic count criteria, a description is provided under each table below. If there is more than one error for a particular element, the record should only be counted one time.

Q1 provides a validation table for the report. Cells in each of the tables refer back to Q1 for validation and for calculating percentages. (See references to “VAL.B1”, “VAL.B2”, etc. throughout the tables below)

### **Q1. Report Validation Table**

	<b>A</b>	<b>B</b>
1	Total number of persons served	
2	Number of adults (age 18 or over)	

3	Number of children (under age 18)	
4	Number of persons with unknown age	
5	Number of leavers	
6	Number of adult leavers	
7	Number of adult and head of household leavers	
8	Number of stayers	
9	Number of adult stayers	
10	Number of veterans	
11	Number of chronically homeless persons	
12	Number of youth under age 25	
13	Number of parenting youth under age 25 with children	
14	Number of adult heads of household	
15	Number of child and unknown-age heads of household	
16	Heads of households and adult stayers in the project 365 days or more	

**Universe:** All active clients

**HMIS Reporting Glossary Reference:** Active Clients; Date of Birth / Age; Project Leaver; Project Stayer; Chronically Homeless at project start.

**Rules**

Not all numbers from this table are used in these Data Quality tables, but this table is standardized across this and other reports.

- For row 10, a veteran:
  - Must be age 18 or older at time of [project start] or [report start date] – whichever is greater.
  - Must indicate ‘yes’ for [veteran status].
- Number of youth under age 25 (Row 12): For the purpose of this report, consistent with the CoC APR, refer to “Youth” above.
- Number of parenting youth under age 25 with children (row 13) = refers to the definition of “youth” as described above, further limited to those with child household members (age < 18 and [relationship to head of household] = 2) also active in the report date range.
- Heads of households and adult stayers in the project 365 days or more (Row 16) should include any adult stayer present when the head of household’s stay is 365 days or more, even if that adult has not been in the household that long.

**Q2. Personally Identifiable Information (PII)**

**Purpose:** Complete PII is critical to a system’s ability to unduplicate and merge client records. Errors look at any record where information is not present because the client didn’t know the response, refused to provide a response or the information was missing or where the response is not consistent with protocols established for the data quality of the element.

	A	B	C	D	E	F
1	Data Element	Client Doesn’t Know/Refused	Information Missing	Data Issues	Total	% of Error Rate
2	Name (3.01)	= [8 or 9]	= missing	= [2]		= [total]/VAL.B1
3	Social Security Number (3.02)	= [8 or 9]	= missing	= [rule]		= [total]/VAL.B1
4	Date of Birth (3.03)	= [rule]	= missing	= [rule]		= [total]/VAL.B1
5	Race (3.04)	= [8 or 9]	= missing			= [total]/VAL.B1
6	Ethnicity (3.05)	= [8 or 9]	= missing			= [total]/VAL.B1
7	Gender (3.06)	= [8 or 9]	= missing			= [total]/VAL.B1
8	Overall Score					= [total]/VAL.B1

## HMIS Reporting Glossary Reference: Active Clients.

### Rules

- Within each row, the column categories are mutually exclusive; records that meet more than one of the criteria described below should be counted in the column for the first match.
- Column B Row 2 – count of clients where [Name Data Quality] = 8 or 9.
- Column C Row 2 – count of clients where [First Name] OR [Last Name] is missing.
- Column D Row 2 – [Name Data Quality] = 2
- Column B Row 3 – count of clients where [SSN Data Quality] = 8 or 9.
- Column C Row 3 – count of clients where [SSN] is missing.
- Column D Row 3 – count of clients where [SSN Data Quality] = 2 OR [SSN] does not conform to Social Security Administration rules for a valid SSN shown below.
  - Cannot contain a non-numeric character.
  - Must be 9 digits long.
  - First three digits cannot be “000,” “666,” or in the 900 series.
  - The second group / 4<sup>th</sup> and 5<sup>th</sup> digits cannot be “00”.
  - The third group / last four digits cannot be “0000”.
  - There cannot be repetitive (e.g. “333333333”) or sequential (e.g. “345678901” “987654321”) numbers for all 9 digits.
- Column B Row 4 – count of clients where ([DOB Data Quality] = 8 or 9) and [DOB] is blank.
- Column C Row 4 – count of clients where [DOB] is missing.
- Column D Row 4 – count of clients where any of the following are true:
  - ([DOB Data Quality] = 8, 9, or 99) and [DOB] is not blank
  - [DOB Data Quality] = 2
  - [DOB] is any one of the values listed below:
    - Prior to 1/1/1915.
    - After the [date created] for the record.
    - For heads of household and adults only: Equal to or after the [project start date]. This test purposely excludes child household members including those who may be newborns.
- Column B Row 5, 6, 7 – count of clients where [Race] [Ethnicity] [Gender] respectively = 8 or 9. For [Race], include records with an 8 or 9 indicated even if there is also a value of 1, 2, 3, 4 or 5 in the same field.
- Column C Row 5, 6, 7 – count of clients where [Race] [Ethnicity] [Gender] respectively is missing.
- Column E Rows 2 through 7 – [total] = the unique count of clients reported in columns B, C or D, i.e. report each record only once per person if the field fails any one of the data quality checks.
- Column E Row 8 – [total] = the unique count of clients reported in columns B, C or D / rows 2 through 7. Again, report each record only once per person even if there are multiple data quality issues in multiple fields.
- Column F - Divide the [total] by the total number of people indicated in the validations table.

### Q3. Universal Data Elements

**Purpose:** These are elements common to all client records and used for HMIS reporting. Errors look at any record where information is not present because the client didn’t know the response, refused to provide a response or the information was missing or where the response is not consistent with protocols established for the data quality of the element.

	A	B	C
1	<b>Data Element</b>	<b>Error Count</b>	<b>% of Error Rate</b>
2	Veteran Status (3.07)	= [8, 9, missing or rule]	= B2/VAL.B2
3	Project Start Date (3.10)	= [rule]	= B3/VAL.B1
4	Relationship to Head of Household (3.15)	= [missing or rule]	= B4/VAL.B1
5	Client Location (3.16)	= [missing or rule]	= B5/(VAL.B14+VAL.B15)



	A	B	C
6	Disabling Condition (3.08)	= [8, 9, missing or rule]	= B6/VAL.B1

**HMIS Reporting Glossary Reference:** Active Clients.

Special Needs = [4.05 physical disability], [4.06 developmental disability], [4.07 chronic health condition], [4.08 HIV/AIDS] [4.09 mental health disorder], [4.10 substance use disorder]

**Rules**

- Column B Row 2: count of adults where [veteran status] = 8, 9, missing OR ([veteran status] = 1 and [Age] < 18).
- Column B Row 3: count of clients where:
  - [Project start date] < [project exit date] for an earlier project start. This detects overlapping project stays by the same client in the same project.
- Column B Row 4: count of all clients where any one of the following are true:
  - [Relationship to Head of Household] is missing or has a value that is not between 1 and 5. OR
  - There is no household member for the group of clients with the same [Household ID] where the [Relationship to Head of Household] = Self (1). I.e. report every household member without an identified head of household for the [Household ID]. OR
  - More than one client for the [Household ID] has a [Relationship to Head of Household] = Self. I.e. report every household member in households where multiple heads of household exist.
- Column B Row 5: count of heads of household where:
  - There is no record of [client location] for the project start with a [data collection stage] of project start (1). OR
  - The [Continuum of Care Code] for the client location record does not match a valid HUD-defined Continuum of Care Code.
- Column B Row 6: count of clients where:

```

([disabling condition] = 8, 9, missing)
or
( [disabling condition] = 0
and
( Developmental Disability and/or HIV/AIDS response = 1 (yes)
or
( Physical Health, Chronic Health Condition, Mental Health Disorder or Substance Use Disorder = yes
and where "substantially impairs ability to live independently" = 1 (yes)
)
)
)
)

```

**Q4. Income and Housing Data Quality**

**Purpose:** These elements are critical for measuring housing and income performance at the project and continuum level. Errors look at any record where information is not present because the client didn't know the response, refused to provide a response or the information was missing or where the response of client has income "yes" or "no" at a data collection stage is inconsistent with the income source information.

	A	B	C
1	<b>Data Element</b>	<b>Error Count</b>	<b>% of Error Rate</b>
2	Destination (3.12)		=B2/VAL.B5
3	Income and Sources (4.02) at Start		=B3/(VAL.B2+VAL.B15)



	A	B	C
4	Income and Sources (4.02) at Annual Assessment		=B4/VAL.B16
5	Income and Sources (4.02) at Exit		=B5/VAL.B7

**HMIS Reporting Glossary Reference:** Active Clients, Leavers, Annual Assessment.

Income sources = [earned income], [unemployment insurance], [SSI], [SSDI], [VA service-connected disability compensation], [VA non- service-connected disability pension], [private disability insurance], [workers' compensation], [TANF], [GA], [retirement from social security], [pension or retirement from a former job], [child support], [alimony or other spousal support], [other source].

### Rules

1. Column B Row 2 – count the number of leavers where [Destination] = 8, 9, 30, or missing.
2. Column B Row 3 – count the number of adults and heads of household active in the report date range where any one of the following are true:
  - a. [income and sources] at start is completely missing.
  - b. There is no record of [income and sources] with an [information date] equal to [project start date] and a [data collection stage] of project start (1).
  - c. [data collection stage] for [income and sources] = 1 AND [income from any source] = 8, 9, or missing.
  - d. [data collection stage] for [income and sources] = 1 AND [income from any source] = 0 AND there are identified income sources.
  - e. [data collection stage] for [income and sources] = 1 AND [income from any source] = 1 AND there are no identified income sources.
3. Column B Row 4 – count the number of adults and heads of household stayers active in the report date range who are expected to have an annual assessment as described under [Annual Assessment](#), AND where any one of the following are true:
  - a. There is no record of [income and sources] with an [information date] within 30 days of the anniversary date and a [data collection stage] of annual assessment (5).
  - b. [information date] is within 30 days of the anniversary date AND [data collection stage] for [income and sources] = 5 AND [income from any source] = 8, 9, or missing.
  - c. [information date] is within 30 days of the anniversary date AND [data collection stage] for [income and sources] = 5 AND [income from any source] = 0 AND there are identified income sources.
  - d. [information date] is within 30 days of the anniversary date AND [data collection stage] for [income and sources] = 5 AND [income from any source] = 1 AND there are no identified income sources.
4. Column B Row 5 – count the number of adult and head of household leavers where any one of the following are true:
  - a. There is no record of [income and sources] with an [information date] equal to [project exit date] and a [data collection stage] of project exit (3).
  - b. [data collection stage] for [income and sources] = 3 AND [income from any source] = 8, 9, or missing.
  - c. [income from any source] = 0 AND there are identified income sources.
  - d. [income from any source] = 1 AND there are no identified income sources.

## Q5. Chronic Homelessness

The fields in elements 3.917 A and 3.917 B Prior Living Situation are the building blocks of determining if someone has been homeless enough time to be reported as chronically homeless. If data is missing in any field in [prior living situation], the HMIS is not able to accurately report chronic homelessness.

	A	B	C	D	E	F	G	H
1	Starting into project type	Count of total records	Missing time in institution (3.917.2)	Missing time in housing (3.917.2)	Approximate Date started (3.917.3) <b>Missing</b>	Number of times (3.917.4) <b>DK/R/missing</b>	Number of months (3.917.5) <b>DK/R/missing</b>	% of records unable to calculate

	A	B	C	D	E	F	G	H
2	ES, SH, Street Outreach							
3	TH							
4	PH (all)							
5	Total	=B2+B3+B4						

**HMIS Reporting Glossary Reference:** Active Clients; Chronic Homelessness at project start.

### Rules

- This question applies to adults and heads of household active in the date range who started in the project any time after 10/1/2016, which was when element 3.917 was restructured to improve data entry. Apply an extra filter of [\[project start date\] >= 10/1/2016](#) to all records for this question.
- Row 2 reports on adults and heads of household active in Street Outreach, Emergency Shelter or Safe Haven ([\[Project Type\] = 1, 4, 8](#)).
- Row 3 reports on adults and heads of household active in Transitional Housing ([\[Project Type\] = 2](#)).
- Row 4 reports on adults and heads of household active in all Permanent Housing types ([\[Project Type\] = 3, 9, 10, 13](#)).
- Column B: Count the total number of adults and heads of household.
- Column C: Count the number of adults and heads of household entering from institution who are missing their [\[Length of stay\]](#):
  - [\[Type of residence\] = 15, 6, 7, 25, 4, 5 AND](#)
  - [\[Length of stay in prior living situation\] = 8, 9, missing.](#)
- Column D: Count the number of adults and heads of household entering from housing and other situations who are missing their [\[Length of stay\]](#):
  - [\[Type of residence\] = 29, 14, 2, 32, 36, 35, 28, 19, 3, 31, 33, 34, 10, 20, 21, 11, 8, 9, missing AND](#)
  - [\[Length of stay in prior living situation\] = 8, 9, missing.](#)
- Columns E, F and G report only on adults and heads of household expected to have answers in fields 3.917.3, .4, and .5 respectively.
  - Row 2 – all active adults and heads of household.
  - Rows 3 and 4 – active adults and heads of household where one of the following is true:
    - [\[Type of Residence\] = 16, 1, 18.](#)
    - ([\[Type of residence\] = 15, 6, 7, 25, 4, 5](#)) AND ([\[Length of stay in prior living situation\] = 10, 11, 2, or 3](#)) AND ([\[On the night before did you stay on streets, ES, or SH\] = 1](#)).
    - ([\[Type of residence\] = 29, 14, 2, 32, 36, 35, 28, 19, 3, 31, 33, 34, 10, 20, 21, 11, 8, 9, missing](#)) AND ([\[Length of stay in prior living situation\] = 10, 11](#)) AND ([\[On the night before did you stay on streets, ES, or SH\] = 1](#)).
- Column E: Count the number of adults and heads of household with missing response in [\[approximate date started\]](#) (3.917.3).
- Column F: Count the number of adults and heads of household with responses 8, 9, or missing in [\[number of times...\]](#) (3.917.4).
- Column G: Count the number of adults and heads of household with responses 8, 9, or missing in [\[number of months...\]](#) (3.917.5).
- Column H: Count the unique number of adults and heads of household missing one or more responses in columns C through G and divide by the total records in column B.

## Q6. Timeliness

Timely data entry is critical to ensuring data accuracy and completeness. This section identifies how quickly project starts and project exits are entered into the HMIS after they occur.

	A	B	C
1	Time for Record Entry	Number of Project Start Records	Number of Project Exit Records
2	0 days		

	A	B	C
3	1-3 days		
4	4-6 days		
5	7-10 days		
6	11+ days		

**HMIS Reporting Glossary Reference:** Active Clients, Leavers.

**Rules**

- Column B – count the number of active clients who started in the report date range, i.e. where [project start date] >= [report start date] and [project start date] <= [report end date], where the days between [project start date] (3.10) and [date created] (5.01) is within the timeframe identified in Column A.
- Column C – count the number of leavers where the days between [project exit date] (3.11) and [date created] (5.01) is within the timeframe identified in Column A.

**Q7. Inactive Records: Street Outreach & Emergency Shelter**

Data quality includes maintaining accuracy in the number of active records in a system. For projects where clients often leave or disappear without an exit (street outreach and night-by-night shelters), the records often remain open and hamper the project and community’s ability to generate accurate performance measurement. This section sets a 90-day limit on inactive records and reports how many records within the report range are inactive (i.e. should have been exited but were not) based on contact with the client for outreach or bed nights for shelter. Column B - # of Records - contains all clients active according to start and exit dates *regardless of project type*.

	A	B	C	D
1	<b>Data Element</b>	<b># of Records</b>	<b># of Inactive Records</b>	<b>% of Inactive Records</b>
2	Contact ( <i>Adults and Heads of Household in Street Outreach or ES – NBN</i> )			=C2/B2
3	Bed Night ( <i>All clients in ES – NBN</i> )			=C3/B3

**Rules**

- Row 2 reports on clients active in project types 1 (where [emergency shelter tracking method] (2.02.C) = 3) and 4.
- Row 3 reports on clients active in project type 1 where [emergency shelter tracking method] (2.02.C) = 3.
- Column B – all clients with [project start date] (3.10) < ([report end date] – 90 days) and ([project exit date] (3.11) is null or [project exit date] > [report end date]).
- Column C Row 2 – count the number of clients with no [current living situation] (4.12) recorded within 90 days of the [project start date] (3.10) or the previous [current living situation], whichever date is greater.
- Column C Row 3 – count the number of clients where the latest [bed night] (4.14) was more than 90 days prior to the [report end date].

## Appendix A: HMIS Imports and Exports

This section contains recommended methods to aid in the export or import of HMIS data in cases where the data in question does not perfectly align to HMIS Data Standards and the official HMIS CSV specifications. These methods may work as-is or may be modified based on the particular data in question.

### Missing or Multiple Head of Household

The procedure below can facilitate the importing of data with “broken” households, or bulk-updating of data within an HMIS, with either no head of household identified or multiple heads of household.

The procedure is a best effort to ensure that everyone present together in a household at a particular project has a household configuration with one and only one head of household ([\[relationship to head of household\] = 1](#)) for a given [\[household ID\]](#).

Follow the sequence below and stop when a match is found.

Household configuration	Set head of household to...
1 person in household	That person
Multiple people with a female* adult	The oldest female age 18 or greater as of <a href="#">[project start]</a>
Multiple people without a female* adult	The oldest person age 18 or greater as of <a href="#">[project start]</a>
Multiple people all age 17 or less, with one or more children age 10 or less	The oldest person age 11 or greater as of <a href="#">[project start]</a>
Multiple people all age 11 to 17	Split the household into one household per person, i.e. they are each a head of household

\* Look for any client where [\[gender\]](#) includes “female” (response 0) regardless of other responses.

## Combining Households – Matching Child HoHs with Adults

The simple report and procedure below can help identify child heads of household in projects which do not normally have them, alongside adults previously present with the child in the HMIS who is also at the same project. This may be the result of users improperly identifying households during data entry or some error during the export or import of HMIS data. This information can be used to merge the two separate households into one (however that is done in the particular HMIS), with the adult as the head of household. The report can be used as-is or modified as needed based on specific HMIS database characteristics.

### Sample report output

	A	B	C	D	E	F	G	H
1	Project name	Child name	Age at entry	Project dates	Previously at project name	Previous project start date	Adult present with child	Adult currently present at same project
2	Project ABC	Atom Ant	5	1/10/2022 - present	Project ZBQ	6/1/2021	Suzie Ant	1/10/2022 - present
3	Project ABC	Davi Quark	7	3/1/2022 - 3/15/2022	Project ZBQ	9/2/2021	Roger Quark	2/15/2022 - 3/15/2022

### HMIS Reporting Glossary Reference: Active Clients

#### Programming instructions

1. Select all clients active in the desired project(s) in a given date range. Because the goal of this report is to aid users or administrators to correct data, it's necessary to select *all* enrollments active in the report date range – not just the latest one for each client.
2. Determine each client's age as of [project start date]. Note this is slightly different than determining the client's age for general reporting purposes.
3. Identify the clients whose age is  $\leq 17$  as of [project start date] who are the head of household ([relationship to head of household] = 1). This is the universe of clients for this report. Output their data in columns A through D. Note this could result in the same client being listed more than once if more than one enrollment matches the report criteria.
4. For each row, scan that child's prior project enrollments for one where that child *wasn't* the head of household but instead was with an adult (age at [project start date] > 17). The report is most useful if it includes all project stays across the entire HMIS to maximize the likelihood of detecting a relevant adult.
5. Output that enrollment information in columns E through G.
6. Using the adult record found in step 4, if that adult is also present in the same project as column A (the one where the child HoH is) with dates overlapping the child's, output the adult's [project start date] in that project in column H.
7. Using the data discovered, users or administrators can match up children with a likely head of household at the same project.