



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 created by HMIS Vendors for HMIS Vendors.

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 HMISs 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
10/5/2015	2.2	<ul style="list-style-type: none">• Data Quality Reporting: changed client universe on Destination from adults and heads of household to all clients, in accordance with 2014 Rev. 3 HMIS Data Standards.• Data Quality Reporting: changed “Length of time on street...” (element 3.17), in accordance with 2014 Rev. 3 HMIS Data Standards.• Removed section on Disabling Condition. 2014 Rev. 3 Data Standards explain the population and use of this element without need for additional programming clarifications.
1/5/2016	2.3	<ul style="list-style-type: none">• Data Quality Reporting for UDE: Clarification that [length of time on street, in an emergency shelter or safe haven] should reference field 1 of element 3.17 (3.17.1)

Date	Version	Description
9/2016	5	<ul style="list-style-type: none"> Age – removed instructions for data entry. Bed Night – removed instructions for data entry. Chronic Homelessness – updated for Data Standards and Chronic Homelessness Final Rule.
12/2016	5.1	<ul style="list-style-type: none"> HMIS Data Quality Report programming instructions added. Fixed example #4 in “CH at project entry because of other household members” Added Annual Assessment instructions
1/31/2017	5.1	<ul style="list-style-type: none"> Corrected element numbering in special needs list in Data Quality report Q3 and corrected to include HIV/AIDS; Corrected list of income sources in Data Quality report Q4 to include SSDI

Definitions

Unless otherwise noted, this document was written using the language of the 2014 HMIS Data Standards v. 5 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 (2.5, 3.10, 3.11, 4.12, 4.14, 4.14E)

- [\[method for tracking emergency shelter utilization\]](#) (2.5)
- [\[project entry date\]](#) (3.10)
- [\[project exit date\]](#) (3.11)
- [\[contact\]](#) (4.12)
- [\[services provided – date of service\]](#) (4.14)
- [\[services provided – bed night date\]](#) (4.14E)

“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. The determination of active clients may vary based on the type of project for which the report question is being executed. “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 entry 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, contacts, or services dated within the report date range and attached to the client record indicates an active client (Method 2 below).

Method 1 - Active Clients

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

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

Method 2 - Active Clients

Some projects have less formal project entry 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 any event, this form must have the date of service.

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], 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 entry 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.

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

A given report may specify that the client's date of service also fall between the client's project entry and exit dates. If so, the italicized lines above also apply. If no such specification exists, ignore the italicized lines.

If the project is street outreach or another project type which utilizes a contact, the [date of contact] (4.12) is used to determine if the client was active within a reporting period and the person must have at least one direct contact to be active within the reporting period. These project types utilize Method 2 above replacing date of service with date of contact in the logic statements.

Methods and project types

Below is a chart of each standard HMIS project type and which method should generally be used to determine active clients.

Project type	Active Clients method
Emergency Shelter – which uses 2.5 Method for Tracking ES Utilization - entry /exit date	1
Emergency Shelter – which uses 2.5 Method for Tracking ES Utilization - night-by-night	2
Transitional Housing	1
Permanent Supportive Housing (disability required for entry)	1
Street Outreach	2
Services Only	1 or 2
Other	1 or 2
Safe Haven	1
PH – Housing only	1
PH – Housing with Services (no disability required for entry)	1
Day Shelter	2
Homelessness Prevention	1
PH - Rapid Re-Housing	1
Coordinated Assessment	1 or 2

Bed Night and Length of Stay

HMIS Data Standards fields referenced (2.5, 3.10, 3.11, 4.14E)

- [\[method for tracking emergency shelter utilization\]](#) (2.5)
- [\[project entry date\]](#) (3.10)
- [\[project exit date\]](#) (3.11)
- [\[services provided – bed night date\]](#) (4.14E)

“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. For emergency shelters, the method for counting bed nights varies based on the Method for Tracking Emergency Shelter Utilization (2.5). Bed nights are counted using an Entry/Exit Date Method ([\[method for tracking\]](#) = 0) or Night-by-Night Method ([\[method for tracking\]](#) = 3). A count of nights spent in a project is used to determine [\[length of stay\]](#).

Method 1 – Bed Night - Entry/Exit Date

Method one for determining a bed night is based on the comparison between the [\[project entry date\]](#) and [\[project exit date\]](#) and/or [\[report end date\]](#) as described below.

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

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.

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 – Bed Night - Night-by-Night

A second method for counting bed nights is the Night-by-Night Method.

Bed nights = count of unique nights attached to the client’s enrollment

Nights must be:

>= [project entry 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.

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.

Chronic Homelessness Status¹

HMIS Data Standards fields referenced (2.4, 2.5, 3.8, 3.10, 3.917, 4.12, 4.5, 4.6, 4.7, 4.8, 4.9, 4.10)

- [project type] (2.4)
- [method for tracking emergency shelter utilization] (2.5)
- [project entry date] (3.10)
- [living situation] (3.917)
- [disabling condition] (3.8)
- [contact] (4.12)
- [physical disability] (4.5)
- [developmental disability] (4.6)
- [chronic health condition] (4.7)
- [HIV/AIDS] (4.8)
- [mental health problem] (4.9)
- [substance abuse] (4.10)

Overview

The 2014 v5 Data Standards specify that data entry in [living situation] requires some type of dependent fields such that fields used in determining CH are only answerable under certain conditions. Because of these inherent field dependencies, the chronic homelessness calculation can directly reference these fields without checking the parent field responses.

CH at project entry

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

CH at project entry because of other household members

The members of a household present at project entry for the household as a whole (i.e. the earliest [project entry date] of anyone in the household on a specific stay) can cause other household members present at entry to be

¹ [Defining Chronically Homeless Final Rule](#)

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 entry date.

Note that reporting on clients' CH-at-entry 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 entry 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 entry.

CH at project entry

For an adult or head of a household, the following conditions must be true to be considered chronically homeless at entry on a particular project stay:

- (
- [disabling condition] (3.8) = yes
- or
- [expected to be of long–continued and indefinite duration and substantially impairs ability to live independently] = “Yes” (1) for any of the following:
 - [physical disability] (4.5), [developmental disability] (4.6),
 - [chronic health condition] (4.7), [HIV/AIDS] (4.8), [mental health problem] (4.9),
 - [substance abuse] (4.10)
-)
- and (
- [living situation] (3.917.1) = 16, 1, 18 or 27
- or
- [on the night before, did you stay in streets, ES or SH?] (3.917.2c) = yes
- or
- [project type] (2.4) = 1 or 4 or 8

```

)
and (
    [approximate date started] (3.917.3) <= [project entry date] (3.10) – 365 days
    or
    (
        [regardless of where they stayed last night -- number of times the client has been on the
        streets, in es, or sh in the past three years including today] (3.917.4) = 4 or more times
        and
        [total number of months homeless on the street, in ES, or SH in the past three years] (3.917.5) >= 12
    )
)

```

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 entry 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 entry 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 entry may be considered CH later because of their additional time active in that project. In addition to data from project entry, an individual’s chronic homeless status may also include disabling condition and special needs data entered subsequent to project entry ([data collection stage] = 1, 2, 3, or 5) to the extent that data is available.

Each report (e.g. AHAR, Point-In-Time for eHIC) 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 entry in the project:

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

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

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

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

Street outreach projects

Use the [contacts] (4.12) where the client was in a place not meant for habitation 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.

Contact [information date] >= [project entry date]
and [information date] < [project exit date]
and [information date] <= [point-in-time date]
and [information date] > month indicated in [project entry date]
and [location of contact] = 1 (“Place not meant for habitation”)

[Months in project] Examples

In a project using entry/exit dates, a client comes in January 31st 2015 and leaves March 2nd 2015. The client answered “4/30/2014” for the approximate date she became homeless. The [months homeless prior to entry] = 10 (April through January 2015). 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 entry date] of January 31st 2015, the client’s first bed night attached to that project stay is also 1/31/2015 with a second bed night on 3/1/2015. He also answered “4/30/2014” for the [approximate date started]. The [months homeless prior to entry] = 10, and [months in project] = 1 (January is excluded, no bed night in February, and one bed night in March).

```
(
  [disabling condition] (3.8) = yes
  or
  [expected to be of long–continued and indefinite duration and substantially impairs ability to
  live independently] = “yes” (1) for any of the following:
    [physical disability] (4.5), [developmental disability] (4.6),
    [chronic health condition] (4.7), [HIV/AIDS] (4.8), [mental health problem] (4.9),
    [substance abuse] (4.10)
)
and (
  [project type] (2.4) = 1 or 4 or 8
)
and (
  [months homeless prior to entry] + [months in project] >= 12
  or
  (
    [regardless of where they stayed last night -- number of times the client has been on the
    streets, in es, or sh in the past three years including today] (3.917.4) = 4 or more times
    AND
    [total number of months homeless on the street, in ES, or SH in the past three years] (3.917.5)
    + [months in project] >= 12
  )
)
```

Contact

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

- [project entry date] (3.10)
- [project exit date] (3.11)
- [contact] (4.12)

[Project entry date] records the first time a person is seen and is the date of first contact.

[Contact] is an interaction between a street outreach worker (or other project type requiring a contact) and a client. Each time the outreach worker contacts a client a record of that contact is entered into HMIS, including where the contact occurred.

A client may have more than one contact on a given date. When counting contacts within a given date range, each contact should be included in the count.

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

A given report may specify that the client's contact dates fall between the client's project entry 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 (3.3, 3.10)

- [date of birth] (3.3)
- [date of birth data quality] (3.3)
- [project entry date] (3.10)

A client's age is defined as of [project entry 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 entered the project after the [report start date], use the client's age as of project entry.

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 entry date] or [report start date], whichever is greater.

```
If [project entry date] <= [report start date] Then
    Age = [report start date] – [date of birth]
Else
    Age = [project entry 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.

Date of Engagement

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

- [\[project entry date\]](#) (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 entry date or contact 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:

```
\[project entry date\] <= \[report end date\]  
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 \[date of engagement\] >= \[project entry date\]  
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, 4.20)

- [\[project entry date\]](#) (3.10)
- [\[project exit date\]](#) (3.11)
- [\[PATH Status\]](#) (4.20)

“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 entry date, contact 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 4.20, 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 entry 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 entry date]
and ( [date of enrollment] <= [project exit date] or [project exit date] is null)
```

Household Types

HMIS Data Standards fields referenced (3.14)

[household id] (3.14)

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 entry. 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.

The following guidance is specific to the APR and other reports but **excludes** the AHAR, which does not allow for unknown household types.

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

- [\[personal id\]](#) (3.13)
- [\[household id\]](#) (3.14)
- [\[relationship to head of household\]](#) (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)

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

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.

The method of determining a leaver is based on the client's last project exit [project exit date] in the reporting period for the project(s) being reported on. For clients with multiple project entries and exits during the reporting period the report should consistently use the last exit recorded for projects(s) being reported on.

[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-entered the project before the report end date.

The method of determining a stayer is based on the client's last project enrollment during the reporting period for the project(s) being reported on. 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 entry 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 client's anniversary most relevant to the [report date range]. The instructions below describe how to select this exact record for each client.

1. Calculate each client'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 entry 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.
2. If the client's number of years in the project is 0, the client is not yet required to have an annual assessment.
3. If the client's number of years in the project is more than 0, add that number to the year of client's [project entry date]. This becomes the client's relevant anniversary date for the purposes of the report. For example, using a report date range of 10/1/2014 – 9/30/2015, a client with a project entry date of 6/1/2013 will have been in the project 2 years as of 9/30/2015 and so will have an [anniversary date] of 6/1/2015. I.e. 2013 + 2 = 2015.
4. Use the latest annual assessment ([data collection stage] = 5) for each client 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])
5. 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]. Such annual assessment data may be used and reported on in the following reporting period, but not the current one.
6. Clients with no annual assessment data in the relevant date range as indicated in step 4 may be reported as "missing annual assessment" or may be completely omitted depending on the report 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 can 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.

Q1. Report Validation Table

	A	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 more than 365 days	

Universe: All active clients

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

Rules

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

- Number of youth under age 25 (Row 12): For the purpose of this report, consistent with the CoC APR, “Youth” = any client age ≥ 12 and ≤ 24 provided that not one household member is above that age range. If so, exclude the entire household including the person age ≥ 12 and ≤ 24 .
- Number of parenting youth under age 25 with children (row 13) = refers to the definition of “youth” as described in the bullet 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.

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
1	Data Element	Client Doesn’t Know/Refused	Information Missing	Data Issues	% of Error Rate
2	Name (3.1)	= [8 or 9]	= missing	= [2]	= [total]/VAL.B1
3	Social Security Number (3.2)	= [8 or 9]	= missing	= [rule]	= [total]/VAL.B1
4	Date of Birth (3.3)	= [8 or 9]	= missing	= [2]	= [total]/VAL.B1
5	Race (3.4)	= [8 or 9]	= missing		= [total]/VAL.B1
6	Ethnicity (3.5)	= [8 or 9]	= missing		= [total]/VAL.B1
7	Gender (3.6)	= [8 or 9]	= missing		= [total]/VAL.B1
8	Overall Score				= [total]/VAL.B1

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 / 5th and 6th digits cannot be “00”.
 - The third group / last four digits cannot be “0000”.
 - There cannot be repetitive (e.g. “33333333”) 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.
- Column C Row 4 – count of clients where [DOB] is missing.
- Column D Row 4 – count of clients where [DOB Data Quality] = 2 OR where [DOB] is any one of the values listed below
 - Prior to 1/1/1915.
 - After the [date created] for the record.
 - Equal to or after the [project entry date].
- 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. Divide the [total] by the total number of people indicated in the validations table.
- 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.

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	Data Element	Error Count	% of Error Rate
2	Veteran Status (3.7)	= [8, 9, missing or rule]	= B2/VAL.B2
3	Project Entry 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)
6	Disabling Condition (3.8)	= [8, 9, missing or rule]	= B6/VAL.B1

HMIS Reporting Glossary Reference: Active Clients.

Special Needs = [4.5 physical health], [4.6 developmental disability], [4.7 chronic health condition], [4.8 HIV/AIDS] [4.9 mental health problem], [4.10 substance abuse]

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 entry date] < [project exit date] for an earlier project entry. 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 entry with a [data collection stage] of project entry (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 there is at least one special need where “substantially impairs ability to live independently” = 1)

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	Data Element	Error Count	% of Error Rate
2	Destination (3.12)		=C2/VAL.B5
3	Income and Sources (4.2) at Entry		=C3/(VAL.B14+VAL.B15)
4	Income and Sources (4.2) at Annual Assessment		=C4/VAL.B16
5	Income and Sources (4.2) at Exit		=C5/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 entry is completely missing.
 - b. There is no record of [income and sources] with an [information date] equal to [project entry date] and a [data collection stage] of project entry (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 in project stays of >= 365 days as of the [report end date] 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 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 [Living Situation], the HMIS is not able to accurately report chronic homelessness.

	A	B	C	D	E	F	G	H
1	Entering 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) DK/R/missing	Number of times (3.917.4) DK/R/missing	Number of months (3.917.5) DK/R/missing	% of records unable to calculate
2	ES, SH, Street Outreach							
3	TH							
4	PH (all)							
5	Total	=B2+B3+B4						

HMIS Reporting Glossary Reference: Active Clients; Chronic Homelessness at Entry.

Rules

- 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, 24, 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] = 14, 23, 21, 3, 22, 19, 25, 20, 26, 12, 13, 2, 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, 27.
 - ([Type of residence] = 15, 6, 7, 24, 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] = 14, 23, 21, 3, 22, 19, 25, 20, 26, 12, 13, 2, 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 responses 8, 9, or missing 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 entries and project exits are entered into the HMIS after they occur.

	A	B	C
1	Time for Record Entry	Number of Project Entry Records	Number of Project Exit Records
2	0 days		
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 where the days between [project entry date] (3.10) and [date created] (5.1) 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] (5.1) 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 entry and exit dates *regardless of project type*.

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

Rules

- Row 2 reports on clients active in project types 1 (where [emergency shelter tracking method] (2.5) = 3) and 4.
- Row 3 reports on clients active in project type 1 where [emergency shelter tracking method] (2.5) = 3.
- Column B – all clients with [project entry 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 [contact] (4.12) recorded within 90 days of the [project entry date] (3.10) or the previous [contact], whichever date is greater.
- Column C Row 3 – count the number of clients where the latest [bed night] (4.14E) was more than 90 days prior to the [report end date].

Acknowledgements

*The HMIS Standard Reporting Terminology glossary
was developed for HMIS vendors by HMIS vendors.*

This project was an outgrowth of the monthly HMIS vendor meetings convened by the U.S. Department of Housing and Urban Development and authorized through HMIS Technical Assistance. Over the course of a few months a group of HMIS vendors met to select key terms, prepare logic, peer-review and update the document. The glossary is designed as a tool that provides a common language and basic programming logic to be used by HMIS programmers in the development of reporting for HUD and their federal partners. The logic provided will enable vendors to create stored procedures for standard queries required for reporting, writers to use standard terms and procedures in specifying reports, and federal partners to utilize tested methods for reporting.

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