

HMIS PATH ANNUAL REPORT PROGRAMMING SPECIFICATIONS



U.S. Department of Housing and Urban Development

ALIGNS WITH FY 2024 HMIS DATA STANDARDS | RELEASED JUNE 2023
FOR REPORTING BEGINNING OCTOBER 1, 2023

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Revision History

Date	Version	Description
2023	1	<p>Update document throughout to align with FY24 HUD HMIS Data Standards</p> <p>Updated CSV format specification guidance for exports</p> <p>Introduction: added table sample</p> <p>Sample file fragments updated</p> <p>Program and Project Type Applicability: text/formatting updates</p> <p>Determining Which Clients to Include: text/formatting updates</p> <p>Relevant HMIS Data Standard Fields:</p> <ul style="list-style-type: none"> • Removed 3.05 Ethnicity • Updated 3.04 to 'Race and Ethnicity', updated relevant data values • Updated 3.917 Relevant Data values, updated to 'Approximate date this episode started' • Updated 4.02 naming convention • Updated 4.04, naming convention updated, update to VHA option • Updated 4.10, additional wording added • Updated P1, naming convention <p>Q8-Q16 Report Table update to Row 6A, Instructions wording/formatting updated</p> <p>Q17 wording/formatting updated</p> <p>Q18 wording/formatting updated</p> <p>Q19 Report Table and instructions wording/formatting</p> <ul style="list-style-type: none"> • Updated, Row 6A, 16A, 22A updated to 'Client prefers not to answer' <p>Q25 Reporting Table/Instructions</p> <ul style="list-style-type: none"> • Updating format, values, and restructuring for new categorization headings: (Homeless Situations (100-199), Temporary Housing Situations (300-399), Institutional Situations (200-299), Permanent Housing Situations (400-499), Other (1-99) <p>Q26 Reporting Table/Instructions</p> <ul style="list-style-type: none"> • 26a. Gender <ul style="list-style-type: none"> ○ Updated 'Female' to 'Woman (Girl, if child)' ○ Updated 'Male' to 'Man (Boy, if child)' ○ Removed 'No Single Gender' ○ Added 'Non-Binary' ○ Added 'Different Identity' ○ Added 'Culturally Specific Identity (e.g., Two-Spirit)' ○ Updated 'Client prefers not to answer' • 26b. Age <ul style="list-style-type: none"> ○ Updated 'Client prefers not to answer'

Date	Version	Description
		<ul style="list-style-type: none"> • Updated 26c. 'Race and Ethnicity' <ul style="list-style-type: none"> ○ Added 'Hispanic/Latina/e/o' ○ Added 'Middle Eastern or North African' ○ Updated 'Client prefers not to answer' • Removed 26d. 'Ethnicity' • 26e. Veteran Status <ul style="list-style-type: none"> ○ Updated 'Client prefers not to answer' • 26g. SOAR connection <ul style="list-style-type: none"> ○ Updated 'Client prefers not to answer' • 26h. Prior Living Situation <ul style="list-style-type: none"> ○ Updating format, values, and restructuring for new categorization headings: (Homeless Situations (100-199), Temporary Housing Situations (300-399), Institutional Situations (200-299), Permanent Housing Situations (400-499), Other (1-99) ○ Rows renumbered and formulas and instructions updated with new values

Introduction

This *Programming Specification* document complies with the [FY 2024 HMIS Data Standards](#). This version of the PATH Annual Report (“Report”) is due to be available in HMIS implementations by October 1, 2023. PATH grantees will be required to use this version of the Report for any FY 2024 reporting, including quarterly reporting that occurred prior to October 1, 2023.

This Report must permit inputting a date range of the grantee’s choosing, even if that range pre-dates October 1, 2023.

The specifications for each question are broken up into the following components:

Component	Explanation
Report Table	Relevant data responses and fields provided.
Project Types, as determined by the HMIS Data Dictionary	<p>Project types required to complete each question. This is a ‘translation’ of the Program Applicability from the terms used in the Report, to the project types that the HMIS Data Standards require HMIS software to store.</p> <ul style="list-style-type: none">• Questions can be left blank or omitted entirely if they are not applicable to a particular project
HMIS Standard Reporting Terminology Glossary (“Glossary”)	When appropriate, global definitions will be referenced to assist in programming using the most current version of the Glossary.
Programming Instructions	<p>The steps to be taken to generate accurate Report counts include:</p> <ul style="list-style-type: none">• Variables used• Logic to select applicable client records• Detail for how to populate each count within the question

Selecting Relevant Client Project Stay Records for the Report Operating Year

- **Date Range** – A period to be identified by the HMIS end user and differing among each state and territory. Each state or territory’s State PATH Contact (SPC) sets the date range for the reporting period. HMIS end users must be able to enter the dates according to their individual state requirements. At minimum, the HMIS end user will generate a Report for a yearlong period.
 - *Note:* Some states or territories also require quarterly submissions of the PATH Annual Report, known as Progress Reports. Progress Reports can be submitted as either ‘Cumulative Progress Reports’ which include all data for a reporting period, or they can be ‘Discrete Progress Reports’, which contains data for discrete periods that do not overlap. Grantees cannot use the ‘Discrete Progress Reports’ to populate the PATH Annual Report.
- When a Continuum of Care (CoC) serves clients across multiple states, the geocode for the client (Data Element 3.16 [enrollment CoC](#)) can be used to filter clients based on the state in which the client resides.

CSV Export

To facilitate accurate HMIS data submission in the [PATH Data Exchange](#) (PDX), the Substance Abuse and Mental Health Services Administration (SAMHSA) is requiring a CSV format specific to this Report. The export must be a single .zip file containing only the six files listed below. Within each file, there must be exactly the number of rows and columns corresponding to the table shell for the relevant question. Include a comma for every cell in the table, even if it is blank, to make sure every row has the same number of fields. The row and column headers are both case and text sensitive and must align with what is used in the sample tables below (see Exhibit 1: Table Shells). Additionally, row and column headers must be double-quoted.

Exhibit 1: Table Shells

File Number	File Name	Rows	Columns	
1	Q8-Q16.csv	11	2	View table shell
2	Q17.csv	14	2	View table shell
3	Q18.csv	12	3	View table shell
4	Q19-Q24.csv	31	4	View table shell
5	Q25.csv	43	2	View table shell
6	Q26.csv	95	3	View table shell

Sample file – Q8-Q16.csv

This sample illustrates how to calculate clients counts based on PATH engagement elements.

```
"Persons served during this reporting period:", "Count"
"8. Number of persons contacted by PATH-funded staff this reporting period", 423
"9. Number of new persons contacted this reporting period in a PATH Street Outreach project", 353
"10. Number of new persons contacted this reporting period in a PATH Services Only project", 0
"11. Total number of new persons contacted this reporting period (#9 + #10 = total new clients contacted)", 353
"12a. Instances of contact this reporting period prior to date of enrollment", 299
"12b. Total instances of contact during the reporting period", 57
"13a. Number of new persons contacted this reporting period who could not be enrolled because of ineligibility for PATH", 2
"13b. Number of new persons contacted this reporting period who count not be enrolled because provider was unable to locate the client", 4
"14. Number of new persons contacted this reporting period who became enrolled in PATH", 238
"15. Number with active, enrolled PATH status at any point during the reporting period", 242
"16. Number of active, enrolled PATH clients receiving community mental health services through any funding source at any point during the reporting period", 102
```

Sample file fragment – Q25.csv

This sample illustrates how to handle subtitles with no counts in the table shell, along with subtotals.

"Destination at Exit", "Count"
"Temporary Destinations",
"Moved from one HOPWA funded project to HOPWA TH", 327
"Transitional housing for homeless persons (including homeless youth)", 302
"Staying or living with family, temporary tenure (e.g., room, apartment, or house)", 312
"Staying or living with friends, temporary tenure (e.g., room apartment, or house)", 313
"Hotel or motel paid for without emergency shelter voucher", 314
"Subtotal", 35
"Institutional Situation",
(remaining rows clipped)

Sample file fragment – Q26.csv

This sample fragment illustrates placeholder commas for cells that are blank in the table shell.

„Of those with an active enrolled PATH status during this reporting period how many individuals are in each of the following categories?"
"26a. Gender", " Woman (Girl, if child) ", 0
, "Man (Boy, if child)", 1
, "Culturally Specific Identity (e.g., Two-Spirit), 2
, "Transgender", 5
, "Non-Binary", 4
, "Questioning", 6
, "Different Identity, 3
, "Client doesn't know", 8
, "Client prefers not to answer", 9
, "Data not collected", 99
, "TOTAL", 297
(remaining rows clipped)

Program and Project Type Applicability

The data element 2.06 [\[funding sources\]](#) equals response number 21 *HHS: PATH-Street Outreach & Supportive Services Only*.

Each question in the Report has been identified as being applicable to particular project types. Questions which do not apply to a particular project type may not be visible to HMIS end users when the report is run for a given project. The HMIS-generated Report may not omit or leave blank questions, based on these reporting specifications – a 0 must be inserted where relevant.

- A PATH-funded organization may have one or more projects in the HMIS, which are reported in one Report. If the organization uses both project types 4 and 6 (data element 2.02.6 [\[project type\]](#)), the PATH Annual Report should be programmed to run across both project types in one Report and de-duplicate individuals served by both project types.
 - Project Type 4 – *Street Outreach*: PATH-funded street outreach projects focus on people who reside in a place not meant for habitation (e.g., streets, abandoned buildings, etc.).
 - Project Type 6 – *Services Only*: PATH-funded services only projects focus on people who reside in a place meant for habitation, or who are at-risk of homelessness (e.g., emergency shelters, safe havens, etc.).

All questions in the Report apply to both project types except Q9 and Q10. Q9 reports only on project type 4 (*Street Outreach*). Q10 reports only on project 6 (*Services Only*).

Questions about PATH budgets (Q1 – Q7) are not extracted from an HMIS, so no programming instructions are being provided.

Determining Which Clients to Include

Unless otherwise specified, “all person counts” is the unduplicated count of clients within each row of a particular question. This Report utilizes the HMIS Reporting Glossary to define the universe of clients to be included in each Report question. There are three universes used in the report: Active, New & Active, and Active & Enrolled. Each universe is defined here and each question refers to one of the three universes.

Unless otherwise specified, use data from each client’s latest project stay (the stay with the latest 3.10 [\[project start date\]](#)) during the reporting date range. Apply the logic below to this project stay to further determine the relevant clients.

1. **Active:** This Report uses “*Method 2 – Active Clients by Date of Service*” from the Glossary to determine which clients to include in the reporting universe. These criteria apply to all dates for the purposes of determining an active client. The table below lists the date fields to use.

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

Where [\[date\]](#) is any of the following:

Field	Data Standards	Additional qualifications
[current living situation]	4.12	Requires that [current living situation] is identifying contacts directly with the client, not a case worker or housing specialist. If an HMIS is designed to capture other types of contacts, only count contacts with the client.
[date of engagement]	4.13	Where there is not a contact on the [date of engagement], count the date of engagement as a contact.
[PATH status]	P3	Use the [date of status determination] if there is not already a [current living situation] reflecting a client contact on the date and [PATH status – client became enrolled in PATH] = 1 (“yes”).
[services provided – PATH funded]	P1	Use the Service Provided date if there is not already a [current living situation] reflecting a client contact on the date.

2. **New & Active:** New & Active clients are those identified in the Active universe but only those with 3.10 [project start date] during the reporting period should be included. Clients should be counted regardless of [PATH status].

(“Active” as defined in logic statement 1 above.)

And [project start date] >= [report start date]

And [project start date] <= [report end date]

3. **Active & Enrolled:** Active & Enrolled clients are those identified in the Active universe but only those with a P3 [PATH status – client became enrolled in PATH] = 1 (“yes”) prior to or on the end of the reporting period.

(“Active” as defined in #1)

And [PATH status – client became enrolled in PATH] = 1

And [PATH status – date of status determination] <= [report end date]

And [PATH status – date of status determination] >= [project start date]

And ([PATH status – date of status determination] <= [project exit date] or [project exit date] is null)

Determining Age-Related Variables

Per the Glossary, [age] is a global variable determined from a client’s 3.03 [date of birth]. These reporting specifications comply with the recommended methods of determining age per the Glossary.

Relevant HMIS Data Standard Fields

The HMIS Data Standards used in calculating the report are listed here along with the applicable questions.

Number	Name	Relevant Data	Question
3.03	Date of Birth	mm/dd/yyyy	26b
	DOB Data Quality	1, 2, 8, 9, 99	26b
3.04	Race and Ethnicity	1, 2, 3, 4, 5, 6, 7, 8, 9, 99	26c
3.06	Gender	0, 1, 2, 3, 4, 5, 6, 8, 9, 99	26a
3.07	Veteran Status	0, 1, 8, 9, 99	26e
3.08	Disabling Condition	0, 1, 8, 9, 99	26j
3.917	Prior Living Situation	116, 101, 118, 215, 206, 207, 225, 204, 205, 302, 329, 314, 332, 336, 335, 410, 435, 421, 411, 8, 9, 99	26h
	Length of stay in prior living situation	10, 11, 2, 3, 4, 5, 8, 9, 99	26i
	Approximate date this episode of homelessness started	mm/dd/yyyy	26j
	Number of times the client has been on the streets, in ES, or SH in the past three years including today	1, 2, 3, 4, 8, 9, 99	26j
	Total number of months homeless on the street, in ES, or SH in the past three years	101, 102-112, 113, 8, 9, 99	26j
3.10	Project Start Date	mm/dd/yyyy	All
3.11	Project Exit Date	mm/dd/yyyy	All
3.12	Destination	116, 101, 118, 215, 206, 207, 225, 204, 205, 302, 329, 314, 332, 312, 313, 327, 422, 423, 426, 410, 435, 421, 411, 30, 17, 24, 8, 9, 99	25
4.02	Income and Sources – Information Date	mm/dd/yyyy	19
	Income and Sources – Income from Any Source	0, 1, 8, 9, 99	19
	Income and Sources – Supplemental Security Income (SSI)	0, 1	20
	Income and Sources – Social Security Disability Insurance (SSDI)	0, 1	20
4.03	Non-Cash Benefits – Information Date	mm/dd/yyyy	21
	Non-Cash Benefits from Any Source	0, 1, 8, 9, 99	21
4.04	Health Insurance – Information Date	mm/dd/yyyy	22
	Covered by Health Insurance	0, 1, 8, 9, 99	22
	MEDICAID	0, 1	23
	MEDICARE	0, 1	23
	State Children’s Health Insurance Program (or use local name)	0, 1	24
	Veteran’s Health Administration (VHA)	0, 1	24
	Employer – Provided Health Insurance	0, 1	24

Number	Name	Relevant Data	Question
	Health Insurance obtained through COBRA	0, 1	24
	Private Pay Health Insurance	0, 1	24
	State Health Insurance for Adults (or use local name)	0, 1	24
	Indian Health Services Program	0, 1	24
	Other	0, 1	24
4.05	Physical Disability	0, 1, 8, 9, 99	26j
	Physical Disability – Expected to be of long-continued and indefinite duration and substantially impairs the ability to live independently	0, 1, 8, 9, 99	26j
4.06	Developmental Disability	0, 1, 8, 9, 99	26j
4.07	Chronic Health Condition	0, 1, 8, 9, 99	26j
	Chronic Health Condition – Expected to be of long-continued and indefinite duration and substantially impairs the ability to live independently	0, 1, 8, 9, 99	26j
4.08	HIV/AIDS	0, 1, 8, 9, 99	26j
4.09	Mental Health Disorder	0, 1, 8, 9, 99	16, 26j
	Mental Health Disorder – Expected to be of long-continued and indefinite duration and substantially impairs the ability to live independently	0, 1, 8, 9, 99	26j
4.10	Substance Use Disorder	0, 1, 2, 3, 8, 9, 99	26f, 26j
	Substance Use Disorder – Expected to be of long-continued and indefinite duration and substantially impairs the ability to live independently	0, 1, 8, 9, 99	26j
4.11	Domestic Violence – Survivor of Domestic Violence	0, 1, 8, 9, 99	26k
4.12	Current Living Situation – Date of Contact	mm/dd/yyyy	8-15
4.13	Date of Engagement	mm/dd/yyyy	8-14
P1	Services Provided – PATH Funded – Date of Service	mm/dd/yyyy	17
	Services Provided – PATH Funded – Type of PATH Funded Service Provided	1, 2, 14, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12	17
P2	Referrals Provided – PATH – Date of Referral	mm/dd/yyyy	18
	Referrals Provided – PATH – Type of Referral	1, 2, 3, 4, 5, 6, 11, 7, 8, 9, 10	18
	Referrals Provided – PATH – Outcome	1, 2, 3	18
P3	PATH Status - Date of Status Determination	mm/dd/yyyy	12 – 26
	PATH Status - Client Became Enrolled in PATH	0, 1	12 – 26
	PATH Status – Reason not enrolled	1, 2, 3	13a, 13b
P4	Connection with SOAR	0, 1, 8, 9, 99	26g

Report Details Q8 – Q16

Q8 – Q16: Report Table

	A	B	C	D
1	Persons served during this reporting period:	Count	Universe	Project Type
2	8. Number of persons contacted by PATH-funded staff this reporting period		Active	4, 6
3	9. Number of new persons contacted this reporting period in a PATH Street Outreach project		New & Active	4
4	10. Number of new persons contacted this reporting period in a PATH Services Only project		New & Active	6
5	11. Total number of new persons contacted this reporting period (#9 + #10 = total new clients contacted)		New & Active	4, 6
6	12a. Instances of contact this reporting period prior to date of enrollment		Active & Enrolled	4, 6
7	12b. Total instances of contact during the reporting period		Active & Enrolled	4, 6
8	13a. Number of new persons contacted this reporting period who could not be enrolled because of ineligibility for PATH		New & Active	4, 6
9	13b. Number of new persons contacted this reporting period who could not be enrolled because provider was unable to locate the client		New & Active	4,6
10	14. Number of new persons contacted this reporting period who became enrolled in PATH		New & Active	4, 6
11	15. Number with active, enrolled PATH status at any point during the reporting period		Active & Enrolled	4, 6
12	16. Number of active, enrolled PATH clients receiving community mental health services through any funding source at any point during the reporting period		Active & Enrolled	4, 6

Introduction

Count people according to the universe and project type as shown in the report table.

Instructions

1. Do not output columns C and D.
2. Column B Rows 2, 3, 4, and 5: Count people according to the universe and project type as shown in the report table.
3. Column B Row 6: Count the number of contacts between first [\[current living situation\]](#) and the [\[PATH status – date of status determination\]](#).
 - a. Start with the universe of Active clients.
 - b. Of those project stays, further restrict the universe to only the stays that have a [\[PATH status – date of status determination\]](#) dated during the reporting period where [\[client became enrolled in PATH\]](#) = 1 (“Yes”). Note that this may result in more than one project stay for some clients who were present in a project more than once in the report date range.
 - c. Using data from all those project stays, count the total number of contacts that occurred \geq [\[project start date\]](#) and \leq [\[PATH status – date of status determination\]](#).
 - d. A person may have more than one [\[current living situation\]](#) on a given date and each contact should be included in the count.
 - e. Use any of the records in “Determining Which Clients to Include” – 1 (Active). [\[Current living situation\]](#) records should each count separately as a contact, even if multiple records occur on the same day. All remaining types of dates ([\[date of engagement\]](#), [\[PATH status\]](#), [\[services provided – PATH funded\]](#)) should only count once per day, and only when there is no other relevant contact on that day. For example, a worker meets with a client, formally engages the client, and enrolls them:
 - i. [\[current living situation\]](#) on 6/1/2021 (contact #1)
 - ii. [\[current living situation\]](#) on 6/1/2021 (contact #2)
 - iii. [\[date of engagement\]](#) on 6/1/2021 (not counted as contact as there is already a [\[current living situation\]](#) on 6/1)
 - iv. [\[PATH status – date of status determination\]](#) on 6/2/2021 and [\[client became enrolled in PATH\]](#) = 1 (“Yes”) (contact #3)
 - v. [\[services provided – PATH funded\]](#) on 6/2/2021 (not counted as there is already other activity recorded on this date)

These five records amount to three contacts.

4. Column B Row 7: Count the number of contacts between [\[report start date\]](#) and [\[report end date\]](#).
 - a. Start with the universe of Active clients.
 - b. Of those project stays, further restrict the universe to only stays that have a [\[PATH status – date of status determination\]](#) dated during the reporting period where [\[client became enrolled in PATH\]](#) = 1 (“Yes”). Note that this may result in more than one project stay for some clients who were present in a project more than once in the report date range.
 - c. Using data from all those project stays, count the total number of contacts that occurred \geq [\[report start date\]](#) and \leq [\[report end date\]](#).
 - d. A person may have more than one contact on a given date and each contact should be included in the count.
 - e. Use any of the records in “Determining Which Clients to Include” – 1 (Active). [\[Current living situation\]](#) records should each count separately as a contact, even if multiple records occur on the same day. As explained in 3e. above, all remaining types of dates ([\[date of engagement\]](#), [\[PATH status\]](#), [\[services provided – PATH funded\]](#)) should only count once per day, and only when there is no other relevant contact on that day.

5. Column B Row 8: Of the total new persons contacted (Column B Row 5) count the clients that have a [PATH status – date of status determination] dated during the reporting period where [client became enrolled in PATH] = 0 (“No”) and [reason not enrolled] = 1 (“Client was found ineligible for PATH”).
6. Column B Row 9: Of the total new persons contacted (Column B Row 5) count the clients that have a [PATH status – date of status determination] dated during the reporting period where [client became enrolled in PATH] = 0 (“No”) and [reason not enrolled] = 3 (“Unable to locate client”).
7. Column B Row 10: Of the total new persons contacted (Column B Row 5) count the clients that have a [PATH status – date of status determination] dated during the reporting period where [client became enrolled in PATH] = 1 (“Yes”).
8. Column B Row 11: Of the Active clients (Column B Row 2) count the clients that have a [PATH status – date of status determination] where [client became enrolled in PATH] = 1 (“Yes”).
9. Column B Row 12: Of the Active & Enrolled clients (Column B Row 11), count those where A or B (or both) are true:
 - A. Have [services provided – PATH funded] = 4 (“Community Mental Health”) with [date of service] <= [report end date] AND [date of service] >= [report start date]
 - B. OR ([referrals provided – PATH] = 1 (“Community Mental Health”) AND [select outcome for each] = 1 (“Attained”) AND [date of referral] <= [report end date] AND [date of referral] >= [report start date]).

Report Details Q17: Services Provided

Q17: Report Table

Blank	A	B	C	D
1	Type of Service	Number of people receiving service	Universe	Project Type
2	17a. Re-engagement		Active & Enrolled	4, 6
3	17b. Screening		Active & Enrolled	4, 6
4	17c. Clinical assessment		Active & Enrolled	4, 6
5	17d. Habilitation/rehabilitation		Active & Enrolled	4, 6
6	17e. Community Mental Health		Active & Enrolled	4, 6
7	17f. Substance use treatment		Active & Enrolled	4, 6
8	17g. Case management		Active & Enrolled	4, 6
9	17h. Residential supportive services		Active & Enrolled	4, 6
10	17i. Housing minor renovation		Active & Enrolled	4, 6
11	17j. Housing moving assistance		Active & Enrolled	4, 6
12	17k. Housing eligibility determination		Active & Enrolled	4, 6
13	17l. Security deposits		Active & Enrolled	4, 6
14	17m. One-time rent for eviction prevention		Active & Enrolled	4, 6

Introduction

Report the number of Active & Enrolled clients (Q15) that received each service during the reporting period.

Instructions

1. Do not output columns C and D.
2. Individuals who received more than one type of service (e.g., Screening and Case management) should be reported once in all service categories that apply.
3. Individuals who received one service multiple times should only be counted one time for that type of service.
4. Column A Rows 2 – 14: Each row represents a different [\[services provided – PATH funded – type of PATH FUNDED service provided\]](#) as follows:
 - a. *Re-engagement* = where type of service equals 1
 - b. *Screening* = where type of service equals 2
 - c. *Clinical assessment* = where type of service equals 14
 - d. *Habilitation/rehabilitation* = where type of service equals 3
 - e. *Community Mental Health* = where type of service equals 4
 - f. *Substance use treatment* = where type of service equals 5
 - g. *Case management* = where type of service equals 6
 - h. *Residential supportive services* = where type of service equals 7
 - i. *Housing minor renovation* = where type of service equals 8
 - j. *Housing moving assistance* = where type of service equals 9
 - k. *Housing eligibility determination* = where type of service equals 10
 - l. *Security deposits* = where type of service equals 11
 - m. *One-time rent for eviction prevention* = where type of service equals 12

Report Details Q18: Referrals Provided

Q18: Report Table

Blank	A	B	C	D	E
1	Type of Referral	Number receiving each referral	Number who attained the service from the referral	Universe	Project Type
2	Community Mental Health			Active & Enrolled	4, 6
3	Substance Use Treatment			Active & Enrolled	4, 6
4	Primary Health/ Dental Care			Active & Enrolled	4, 6
5	Job Training			Active & Enrolled	4, 6
6	Educational Services			Active & Enrolled	4, 6
7	Housing Services			Active & Enrolled	4, 6
8	Temporary Housing			Active & Enrolled	4, 6
9	Permanent Housing			Active & Enrolled	4, 6
10	Income Assistance			Active & Enrolled	4, 6
11	Employment Assistance			Active & Enrolled	4, 6
12	Medical Insurance			Active & Enrolled	4, 6

Introduction

Report the number of Active & Enrolled clients (Q15) provided with referrals by referral type during the reporting period. Report the number of Active & Enrolled clients that attained services from referrals during the reporting period.

Instructions

1. Do not output columns D and E.
2. Individuals who received more than one type of referral (e.g., employment assistance and community mental health) should be reported once in all categories that apply.
3. Individuals who received a referral multiple times should only be counted one time for that type of referral.
4. Column A Rows 2 – 12: each row represents a different [\[referrals provided – PATH – type of referral\]](#) as follows:
 - a. *Community Mental Health* = where type of referral equals 1.
 - b. *Substance Use Treatment* = where type of referral equals 2.
 - c. *Primary Health/ Dental Care* = where type of referral equals 3.
 - d. *Job Training* = where type of referral equals 4.
 - e. *Educational Services* = where type of referral equals 5.
 - f. *Housing Services* = where type of referral equals 6.
 - g. *Temporary Housing* = where type of referral equals 11.
 - h. *Permanent Housing* = where type of referral equals 7.
 - i. *Income Assistance* = where type of referral equals 8.
 - j. *Employment Assistance* = where type of referral equals 9.
 - k. *Medical insurance* = where type of referral equals 10.
5. Column B Rows 2 – 12: Each row is an unduplicated count of people who received each referral.
6. Column C Rows 2 – 12: Each row is an unduplicated count of people who attained each referral. Column C should be less than or equal to the count in column B.

Report Details Q19 – Q24: Outcomes

Q19 – Q24: Report Table

Blank	A	B	C	D	E
1	Outcomes	At PATH Project Start	At PATH Project Exit (for clients who were exited from PATH in the reporting period – leavers)	At Report End Date (for clients who were still active in PATH as of Report End Date – stayers)	Data Standard Fields and Responses
2	19. Income from Any Source				4.2 Income and Sources Field 2
3	Yes				1
4	No				0
5	Client doesn't know				8
6	Client prefers not to answer				9
7	Data not collected				99
8	Total	=sum(B3:B7)	=sum(C3:C7)	=sum(D3:D7)	
9	20. Supplemental Security Income (SSI)/ Social Security Disability Insurance (SSDI)				4.2 Income and Sources Fields 5 and 6
10	Yes				1
11	No				0
12	21. Non-Cash Benefits from Any Source				4.3 Non-Cash Benefits Field 2
13	Yes				1
14	No				0
15	Client doesn't know				8
16	Client prefers not to answer				9
17	Data not collected				99
18	Total	=sum(B13:B17)	=sum(C13:C17)	=sum(D13:D17)	
19	22. Covered by Health Insurance				4.4 Health Insurance Field 2
20	Yes				1
21	No				0
22	Client doesn't know				8
23	Client prefers not to answer				9
24	Data not collected				99
25	Total	=sum(B20:B24)	=sum(C20:C24)	=sum(D20:D24)	

Blank	A	B	C	D	E
1	Outcomes	At PATH Project Start	AT PATH Project Exit (for clients who were exited from PATH in the reporting period – leavers)	At Report End Date (for clients who were still active in PATH as of Report End Date – stayers)	Data Standard Fields and Responses
26	23. MEDICAID/MEDICARE				4.4 Health Insurance Fields 3 and 4
27	Yes				1
28	No				0
29	24. All other health insurance				4.4 Health Insurance Fields 5, 6, 7, 8, 9, 10, 11, 12
30	Yes				1
31	No				0

Introduction

An unduplicated count of Active & Enrolled clients (Q15) at Project Start and at Project Exit (leavers) or at Report End Date (stayers).

Universe

At Project Start (column B) – Active & Enrolled. At Project Exit (column C) – leavers/enrolled. At Report End Date (column D) – stayers/enrolled.

Instructions

- Do not output column E.
- Column B is an unduplicated count of **Active & Enrolled** clients at data collection stage 1.
- Column C is an unduplicated count of **leavers/enrolled** clients at data collection stage 3.
- Column D is an unduplicated count of **stayers/enrolled** clients at data collection stage 1 OR 2, whichever is later.
- Column B, rows 8, 18, and 25 are totals and should collectively equal Q15.
 - Columns C and D, rows 8, 18, and 25 are totals and should equal Q15 when column C and D are summed.
- Rows 2, 9, 12, 19, 26, and 29 are header rows. There are no calculations in these rows, but they should appear in the output.
- Rows 10 and 11: Supplemental Security Income (SSI)/ Social Security Disability Insurance (SSDI)
 - If **[supplemental security income (SSI)] = 1** AND/OR **[social security disability insurance (SSDI)] = 1**, count the client once as yes.
 - Count of clients as No (0) where **[supplemental security income (SSI)] <> 1** AND **[social security disability insurance (SSDI)] <> 1**.
- Rows 27 and 28: MEDICAID/MEDICARE:
 - If **[MEDICAID] = 1** AND/OR **[MEDICARE] = 1**, count the client once as yes.
 - Count of clients as No (0) where **[MEDICAID] <> 1** AND **[MEDICARE] <> 1**.
- Rows 30 and 31: Other Health Insurance (*Exclude [MEDICAID] and [MEDICARE] from this calculation*):
 - If any one form of health insurance = 1 AND/OR another form of health insurance = 1, count the client once as yes.
 - Count of clients as No (0) where all other forms of health insurance <> 1.

Report Details Q25. Housing Outcomes

Q25: Report Table

Blank	A	B	C
1	25. Destination at Exit	count	3.12 Exit Destination
2	Homeless Situations (100-199)		
3	Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)		116
4	Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home Shelter		101
5	Safe Haven		118
6	Subtotal	Sum (B3:B5)	
7	Institutional Situations (200-299)		
8	Foster care home or foster care group home		215
9	Hospital or other residential non-psychiatric medical facility		206
10	Jail, prison, or juvenile detention facility		207
11	Long-term care facility or nursing home		225
12	Psychiatric hospital or other psychiatric facility		204
13	Substance abuse treatment facility or detox center		205
14	Subtotal	Sum (B8:B13)	
15	Temporary Housing Situations (300-399)		
16	Transitional housing for homeless persons (including homeless youth)		302
17	Residential project or halfway house with no homeless criteria		329
18	Hotel or motel paid for without emergency shelter voucher		314
19	Host Home (non-crisis)		332
20	Staying or living with family, temporary tenure (e.g., room, apartment, or house)		312
21	Staying or living with friends, temporary tenure (e.g., room, apartment, or house)		313
22	Moved from one HOPWA funded project to HOPWA TH		327
23	Subtotal	Sum (B16:B22)	
24	Permanent Housing Situations (400-499)		
25	Staying or living with family, permanent tenure		422
26	Staying or living with friends, permanent tenure		423
27	Moved from one HOPWA funded project to HOPWA PH		426
28	Rental by client, no ongoing housing subsidy		410

Blank	A	B	C
29	Rental by client, with ongoing housing subsidy		435
30	Owned by client, with ongoing housing subsidy		421
31	Owned by client, no ongoing housing subsidy		411
32	Subtotal	Sum (B25:B31)	
33	Other (1-99)		
34	No exit interview completed		30
35	Other		17
36	Deceased		24
37	Client doesn't know		8
38	Client prefers not to answer		9
39	Data not collected		99
40	Subtotal	Sum (B34:B39)	
41	PATH-enrolled clients still active as of report end date (stayers)		
42	Total		

Introduction

An unduplicated count of Active & Enrolled clients (Q15) at Project Start and at Project Exit (leavers) or at Report End Date (stayers).

Universe

Leavers/enrolled and stayers/enrolled

Instructions

1. Rows 2, 7, 15, 24, and 33 are header rows. There are no calculations in these rows, but they should appear in the output.
2. Column B, rows 6, 14, 23, and 32 are totals and each should collectively equal Q25.
3. Column B rows 2 through 39 (not including the total and header rows): report each leaver in the universe according to their [\[destination\]](#) as indicated in column C.
4. Column B row 40: report the total number of stayers in the universe of clients.
5. Column B row 42: report the total number of leavers + stayers in the universe of clients.

Report Details Q26: Demographics

Q26: Report Table

Blank	A	B	C	D	E
1			Of those with an active, enrolled PATH status during this reporting period, how many individuals are in each of the following categories?	Data Standard Fields	Data Standards Responses
2	26a. Gender <i>Note: An individual who identifies with more than one gender option should be counted in all applicable categories. This demographic element will not sum to the total persons enrolled.</i>	Woman (Girl, if child)		3.06 Gender	0
3		Man (Boy, if child)			1
4		Culturally Specific Identity (e.g., Two-Spirit)			2
5		Transgender			5
6		Non-Binary			4
7		Questioning			6
8		Different Identity			3
9		Client doesn't know			8
10		Client prefers not to answer			9
11		Data not collected			99
12		Total	Distinct count of clients		
13	26b. Age	17 and under		3.03 Date of Birth	Refer to HMIS Reporting Glossary for Age calculation
14		18 – 24			
15		25 – 34			
16		35 – 44			
17		45 – 54			
18		55 – 64			
19		65+			
20		Client doesn't know			
21		Client prefers not to answer			
22		Data not collected			
23		Total	Sum (C13:C22)		

Blank	A	B	C	D	E
1			Of those with an active, enrolled PATH status during this reporting period, how many individuals are in each of the following categories?	Data Standard Fields	Data Standards Responses
24	26c. Race and Ethnicity	American Indian, Alaska Native, or Indigenous		3.04 Race and Ethnicity	1
25	<i>Note: An individual who identifies with multiple race/ethnicity options should be counted in all applicable categories. This demographic element will not sum to the total persons enrolled.</i>	Asian or Asian American			2
26		Black, African American, or African			3
27		Hispanic/Latina/e/o			6
28		Middle Eastern or North African			7
29		Native Hawaiian or Pacific Islander			4
30		White			5
31		Client doesn't know			8
32		Client prefers not to answer			9
33		Data not collected			99
34		Total	Distinct count of clients		
35	26e. Veteran Status (adults only)	Veteran		3.07 Veteran Status	1
36		Non-veteran			0
37		Client doesn't know			8
38		Client prefers not to answer			9
39		Data not collected			99
40		Total	Sum (C35:C39)		
41	26f. Co-occurring disorder	Co-occurring substance use disorder		4.10 Substance Use Disorder	1, 2 or 3
42		No co-occurring substance use disorder			0
43		Unknown			8, 9 or 99
44		Total	Sum (C41:C43)		
45	26g. Connection with SOAR	Yes		P4.1 Connection with SOAR	1
46		No			0
47		Client doesn't know			8
48		Client prefers not to answer			9

Blank	A	B	C	D	E
1			Of those with an active, enrolled PATH status during this reporting period, how many individuals are in each of the following categories?	Data Standard Fields	Data Standards Responses
49		Data not collected			99
50		Total	Sum (C45:C49)		
51	26h. Prior Living Situation	Homeless Situations (100-199)		3.917 Living Situation Field 1	Header
52		Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport, or anywhere outside)			116
53		Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home shelter			101
54		Safe Haven			118
55		Institutional Situations (200-299)			Header
56		Foster care home or foster care group home			215
57		Hospital or other residential non-psychiatric medical facility			206
58		Jail, prison, or juvenile detention facility			207
59		Long-term care facility or nursing home			225
60		Psychiatric hospital or other psychiatric facility			204
61		Substance abuse treatment facility or detox center			205
62		Temporary Housing Situations (300-399)			Header
63		Transitional housing for homeless persons (including homeless youth)			302
64		Residential project or halfway house with no homeless criteria			329

Blank	A	B	C	D	E
1			Of those with an active, enrolled PATH status during this reporting period, how many individuals are in each of the following categories?	Data Standard Fields	Data Standards Responses
65		Hotel or motel paid for without emergency shelter voucher			314
66		Host Home (non-crisis)			332
67		Staying or living in a friend's room, apartment, or house			336
68		Staying or living in a family member's room, apartment, or house			335
69		Permanent Housing Situations (400-499)			Header
70		Rental by client, no ongoing housing subsidy			411
71		Rental by client, with ongoing housing subsidy			410
72		Owned by client, with ongoing housing subsidy			421
73		Owned by client, no ongoing housing subsidy			411
74		Other (1-99)			Header
75		Client doesn't know			8
76		Client prefers not to answer			9
77		Data not collected			99
78		Total	Sum (C52:C77)		
79	26i. Length of stay in prior living situation (emergency shelter or place not meant for human habitation only)	One night or less		See instructions #10 below.	10
80		Two to six nights			11
81		One week or more, but less than one month			2
82		One month or more, but less than 90 days			3

Blank	A	B	C	D	E
1			Of those with an active, enrolled PATH status during this reporting period, how many individuals are in each of the following categories?	Data Standard Fields	Data Standards Responses
83		90 days or more, but less than one year			4
84		One year or longer			5
85		Client doesn't know			8
86		Client prefers not to answer			9
87		Data not collected			99
88		Total	Sum (C79:C87)		
89	26j. Chronically homeless (at project start)	Yes		See instructions #11 below.	See instructions #11 below.
90		No			
91		Unknown			
92		Total	Sum (C89:C91)		
93	26k. Survivor of Domestic Violence (adults only)	Yes		4.11 Domestic Violence	1
94		No			0
95		Client doesn't know			8
96		Client prefers not to answer			9
97		Data Not Collected			99
98		Total	Sum (C93:C97)		

Introduction

An unduplicated count of Active & Enrolled clients (Q15).

Universe

Active & Enrolled

HMIS Reporting Glossary Reference

Age

CH at project start

Instructions

1. Do not output columns D and E.
2. Column C rows 51, 55, 62, 69, and 74 are header rows. There are no calculations in these rows, but they should appear in the output.
3. Column C rows 2 – 12 (Gender): Use column E to determine on which row/s to report a client. Because [\[gender\]](#) is a multi-response field, clients are reported according to each selected response, which may result in clients being counted in more than one row.
 - a. Row 3 reports clients with *any* combinations that include “Man (Boy, if child)” in the list. This may be in combination with zero or more other responses.
 - b. Row 8 reports clients with *any* combinations that include “Different Identity” in the list. This may be in combination with zero or more other responses.
4. Column C rows 13 – 23 (Age): Report the distinct counts of clients by age bracket.
5. Column C rows 24 – 34 (Race and Ethnicity): An individual with multiple races identified should be counted in all applicable categories, similarly to the reporting for [\[gender\]](#) responses.
6. Column C rows 35 – 40 (Veteran Status): Filter for clients with Age >= 18
7. Column C rows 41 – 44 (Co-occurring disorder): NOTE: the term “Co-occurring disorder” in this report does not use data in [\[mental health disorder\]](#). The universe of clients for this question are those who are enrolled in PATH as indicated where [\[client became enrolled in PATH\]](#) = 1 (“yes”), which implies that the client has a mental health disorder regardless of what is indicated in 4.09 [\[mental health disorder\]](#). Thus, it is sufficient to report PATH-enrolled clients only according to 4.10 [\[substance use disorder\]](#).
8. Column C rows 45 – 50 (Connection with SOAR): Report the distinct counts clients by data element response.
9. Column C rows 51 – 78 (Prior Living Situation): Report the distinct counts clients by data element response.
10. Column C rows 79 – 88 (Length of stay in prior living situation): Filter for clients with [\[prior living situation\]](#) = 1 (“Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home shelter”) or 16 (“Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)”), then count clients according to [\[length of stay in prior living situation\]](#).
11. Column C rows 89 – 92 (Chronically homeless): Refer to page 10 of the Glossary under “CH at project start” to determine the values below:
 - a. Yes = count of clients where [\[CH at project start\]](#) is true.
 - b. No = count of clients where [\[CH at project start\]](#) is false. This DOES NOT include clients with missing data required for the calculation.
 - c. Unknown = count of clients where [\[CH at project start\]](#) cannot be determined because some data is missing. This cell will include any clients for whom “CH at project start” cannot be determined as “Yes” or “No” per the guidance in the Glossary.
12. Column C rows 93 – 98 (Domestic Violence): Filter for clients with Age >= 18
13. For sections 26f (Co-occurring disorder), 26g (Connection with SOAR), and 26k (Domestic Violence), use the most recent data available for each relevant enrollment, regardless of collection stage, where the [\[information date\]](#) is:
 - a. >= [\[project start date\]](#)
 - b. <= [\[project exit date\]](#)
 - c. <= [\[report end date\]](#)

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