



U.S. Department of Housing and Urban Development

Office of Community Planning and Development

# *HUD Annual Performance Report (APR) Programming Specifications*

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# **HUD Annual Performance Report (APR) Programming Specifications**

## **Acknowledgements**

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### Revision History

Date	Version	Description	Author
9/17/10	1.1	Modifications to question 17b to eliminate cross-tabulation with ethnicity	BESp
12/14/10	1.2	Modification to question 7 destination HUD Data Standard reference; addition of foster care in programming logic in question 20; shading in average change in monthly income per adult cells in question 23 and 24; removal of HPRP program applicability in question 24, 25a2, and 26a2; renumbering question 18a and 18; deleting of total adult column, total children column, and total unknown column in 18b; adding program applicability to question 9a and 9b; language modification for question 7, 3R-V; label and programming code changes from unaccompanied youth to unaccompanied child; removal of third bullet point for question 23 business rules; and change of question 27 to 30 days or less	NFiore
2/22/11	1.3	Modification to question 15 tables Gender of Adults, Gender of Children and Persons Missing Age Information	NFiore
3/15/11	1.4	Added sample date selection logic for records with from and to dates.	MDS
4/27/11	1.5	Revised instructions on the calculation of the LengthOfStay variable to account for the last night a client is a residential program if they stay beyond the reporting period.	MDS
4/27/11	1.5	Revised the detail on the instructions for Q7 to make it clearer to count only outreach clients that were engaged in their last program participation.	MDS
5/2/11	1.5	Modified description of Most Recent Assessment for Q25a and Q26a for leavers to indicate that the assessment is to be within the last program stay.	MDS
5/4/11	1.5	Modification to label on question 23 and 24 to indicate unknown income change.	NFiore
5/18/11	1.6	Modification to instructions for Q12 to clarify and to limit universe to clients with pre-engagement contacts on last program stay.	MMcE
5/18/11	1.6	Added the Outreach_ActiveClient variable to Q7 to denote the difference in logic between Q7 and Q12 for counting engaged clients.	MDS
6/2/2011	1.6	Removed reference to disabling condition data quality field in Q22	DD
8/19/11	1.7	Corrected definition in Q23 / 24 for Unknown Income Change, updated income breakdown chart, changed universe for Q7 residence to prior entry to be only applicable to adults and unaccompanied children, and updated Q25 to clarify when income sources should be counted.	MDS
12/13/11	1.8	Adjusted table in Q23 to reflect revised rules for determining IncomeAtEntry and IncomeAtExit.	APR_WG
3/26/12	1.9	Added clarity to Q36 to not count clients as maintaining income if IncomeAtEntry and IncomeMostRecent are both \$0. Updated screenshots and related instructions in Q36 to match revised layout in eSnaps. Updated text of rule 1 for the PermHousingDestination variable in Q36b and rule 3 for 36c (text did not match the HUD Data Standards text, though the numeric value of 11 was and is correct). Added clarity that Q36c housing outcome question is only applicable to leavers. Added program types 4 and 6 to the list of applicable program types on Q27.	MDS

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5/15/2012	1.10	<p>Adjusted the Program Applicability for 36a to include S+C and SRO projects.</p> <p>Added Shelter Plus Care (S+C) to Program Code 3 (Permanent Supportive Housing) on page 13.</p> <p>Added SRO to Program Code 9 (Permanent Housing) on page 13.</p> <p>Corrected the title in the Table of Contents for question 26a1-b2 and updated the headers for those questions in the specs so that they match <i>e-snaps</i>.</p> <p>Corrected the label for measure 1b in question 36e.</p>	NMatthe ws
6/4/2012	1.11	<p>Several label changes were made to ensure that the programming specs are aligned with the e-snaps screens.</p> <p>Q8: "Missing this information" changed to "Information Missing"</p> <p>Q19b: "Less than 3 months ago" changed to "Within the past 3 months"</p> <p>Q22a2 and Q22b2: "Disabled-Unknown" changed to "Condition Unknown"</p> <p>Q23 and Q24: "Missing/No Follow-Up" changed to "Information Missing"</p> <p>Q22a1, 22a2, 22b1, 22b2, 25a2, 25b1, 25b2, 26a1, 26a2, 26b1, 26b2: "Unknown" changed to "Age Unknown"</p> <p>Q29a2: "Hotel or Motel, paid without Emergency Shelter Voucher" changed to "Hotel or Motel, paid by client." "VASH" changed to "Rental by client, VASH subsidy." "(Non-VASH)" changed to "Rental by client, other ongoing subsidy." "With friends" and "With Family," changed to "Living with friends, permanent tenure" and "Living with family, permanent tenure." "Incarcerated" changed to "Jail or Prison."</p> <p>Added "SHP-SH" to Program Applicability for Q9, Q10, and Q11.</p> <p>Added 8 to Program Type Code for Q11.</p> <p>Updated the Program Applicability section for all questions to use a consistent naming and formatting structure, including listing out each SHP program instead of stating "All SHP"</p>	EBarber
8/1/2012	1.12	<p>Removed "HPRP" from the Program Applicability section of questions 18a, 18b, 19a, 19b, 22a1, and 22a2.</p> <p>Capitalization corrections made to questions 29a1 and 29a2, to ensure consistency with the e-snaps screens. Also corrected "Jail or Prison" to "Jail, prison or juvenile detention facility," and "Foster Care" to "Foster care or group foster care home."</p> <p>"SH" was corrected to "SHP-SH" for question 36e under the heading "Program Applicability" on page 106.</p>	EBarber

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# HUD Annual Performance Report (APR) Programming Specifications

## Introduction

The APR Report Programming Specifications are being provided to support and guide HMIS software providers as they embark on generating the HUD Annual Performance Report (APR) for homeless programs. As HMIS software providers use a variety of development platforms, and have different database designs, the approach taken was one whereby the developer(s) could ascertain the Business Rules and data sources for each of the questions without being overly specific on approach.

The new HUD APR report is significantly more detailed than the prior version. There are some questions that will appear similar to the previous version of the APR; however there are several new sections related to the data elements that were added to the *2010 HMIS Data Standards*. In addition to the questions related to the new fields, questions that have been added that can be used to ascertain the overall quality of the data that was used to create the report. The reporting logic starts with a section on data completion rates as these figures reflect the overall integrity of the data used in the questions that follow. Combining a program's bed capacity with the number of active clients on four different dates helps to ascertain whether or not there are issues with clients being entered or exited properly.

These specifications reflect the business rules defined by HUD for the APR, along with the programming logic used in the creation of the *APR Reporting Tool* so that, when used together, programmers will have the guidance needed to code and audit the APR in their own development environment. The *APR Reporting Tool* can also serve as an interim reporting tool for anyone using HMIS software that can generate data in the HUD HMIS CSV format and does not have a functioning APR report in place. The intent of the specifications is to cover the questions where the information needed to answer the question is to be pulled from HMIS. Therefore, none of the form questions to be filled out by the applicant are covered within these specifications.

## **HUD Annual Performance Report (APR) Programming Specifications**

### **Notable Discrepancies between the HUD APR and AHAR Reports**

There are sections of the new HUD APR that may appear similar to sections of the Annual Homelessness Assessment Report (AHAR). As it is typically faster to reuse existing code than to write it from scratch, developers might want to borrow code from the AHAR report for the new APR. While the practice of reusing code can reduce development times, it is important to be aware of a few notable differences between the two reports before doing so. Items of note include the following:

- The AHAR uses data from the first program stay whereas the APR uses data from the latest program stay within the reporting period.
- Age for the AHAR is derived from subtracting the date of birth from the first day of the reporting period for any clients that entered prior to the first day of the operating year. Since the APR is based on latest enrollment this can be true for the APR as well IF there is only one program stay and it commenced prior to the reporting year. Otherwise, the [program entry date] (3.12) of the *most recent* program stay is used to calculate age for the APR.
- For the AHAR, developers need to calculate how many total nights a person spent in shelter or housing during the reporting year. So if a client came on September 20<sup>th</sup> of the prior year and left on October 5<sup>th</sup> of the AHAR reporting year they would only have the five days counted that were within the AHAR period, which runs from October through September. If the client came back on March 1 and left on March 10<sup>th</sup> then he or she would have a total of 14 days. This differs from the APR Length of Participation, which is based solely on a client's last program stay and counts the number of days in the entire program stay, including days prior to the start of the reporting period.
- The determination of household status for the AHAR is based on the household ID and the clients served with that ID upon program entry. A person's household status for the APR is based on the client's last program stay and household members with whom the client was served during the program stay. More details on this are provided with the instructions for questions 8 and 9.
- The AHAR counts a distinct household whenever a new person is added to an existing household. In the APR, a household is only considered distinct if there is a new program stay with a configuration that has never been served together previously, and the household does not contain any adults who have been served previously in the operating year.

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## Documentation Notes

The specifications provide guidance for programming each HMIS-generated question within the HUD Annual Performance Report (APR). In order to accomplish this, the specifications for each APR question are broken up into the following components:

- 1) **Question Name** – this is the full name of the question followed by the name of the corresponding sheet in the *APR Reporting Tool*.
- 2) **Screenshots** – the screenshots are from the Excel-based *APR Reporting Tool* and include color coding of cells to differentiate their intent. The breakdown of the color coding is as follows:
  - White fields** are the fields containing counts that need to be generated by the HMIS and entered into *e-snaps*. (On the *APR Reporting Tool*, these fields contain formulas used to generate the counts within the report.)
  - Grey fields** are reserved for totals and percentages that can be derived directly from data in the white fields. When submitting APRs, *e-snaps* will automatically generate and display these data. HMIS vendors may choose to generate the data for these fields when building their APR, but this is not required.
- 3) **Program Applicability** – these are the program types for which the question applies, as listed in the APR documentation from HUD. Questions can be left blank or omitted entirely if they are not applicable.
- 4) **Program Types** – program types (as listed in the HUD Data Standards) required to complete each question. This is, in essence, a ‘translation’ of the Program Applicability from the terms used in the APR to the program types that the HUD Data Standards require HMIS systems to store.
- 5) **Business Rules** - this section explains the intent of each question and highlights any items to be aware of when preparing the programming logic.
- 6) **Programming Instructions**- this is the detailed outline of the steps taken in the *APR Reporting Tool* to generate accurate report counts. This includes the variables used, the client logic to select applicable client records, and the detail for how to populate each count within the question, and is provided to illustrate one possible approach to implementing the business rules.

**Variables Used** - there are three types of variables described within the documentation which are as follows:

- a) **Fields Referenced from the HUD HMIS Data Standards** - used when there is a direct reference to a field/element found within the HUD HMIS Data Standards. Data standards fields will be denoted by brackets around the field, followed by the Data Standards reference number in parentheses where possible; for example: [program entry date] (3.12).
- b) **Global Variables** -elements used within formulas that are based on a combination of fields/data elements within the HUD HMIS Data Standards and may need programming logic in order to assign a value to the reporting element. Global variables are used across multiple questions. It is not necessary that a programmer use these variables in

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programming their own APR; they are used here to simplify the descriptions of the business logic for each question and to demonstrate one possible approach. The rules for deriving the global variables are outlined in Section 5 of the programming specifications. These variables are referenced by variable name within each question.

- c) **Local Variables** – these are variables that are also a derivative of those found within the HUD standards or of the global variables, but are unique to the particular question. Again, it is not necessary that programmers use these variables; they are used in this document to illustrate one possible approach.

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### Selecting Relevant Program Stay Records for the Operating Year

Data related to any program stay that overlaps the reporting period should be included in the data universe of the APR<sup>1</sup>, including data that was collected prior to the start of the reporting period in the event that the program entry date is prior to the start of the reporting period and the client was still in the program as of the first day of the reporting period. In no case will data collected after the last day of the reporting period be included on the APR.

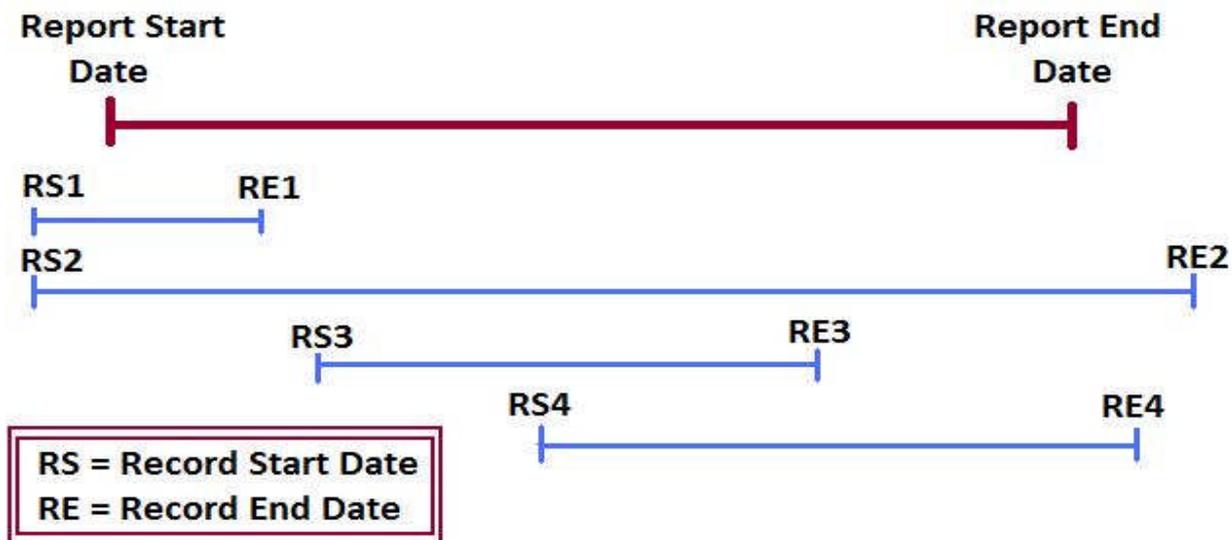
In order to be included in the data universe, a program stay should have:

1. A program entry date on or before the last day of the reporting period; and
2. A program exit date that is either blank (because the client has not yet exited) or on or after the first day of the reporting period.

To match the selection rules stated above, a sample script might appear as follows...

*(EntryDate <= ReportEndDate) and ((ExitDate >= ReportStartDate) or (ExitDate = ""))*

In the graphic below, the reporting period is represented by the thick line at the top and several different program stays are represented by the thinner lines below it; all of the data pertaining to each of the program stays depicted below *up to the report end date* is included in the data universe of the APR. Any data collected after the report end date, e.g. exit data for RE2, is not included in the data universe. These record selection rules apply to all records that are for a date range. The diagram below outlines the complexity of identifying whether a client was served during a reporting period. Selecting just the records with a record start date within the reporting period would neglect to count records that started before the reporting period. Selecting records that started OR ended during the reporting period would miss records that started before the start of the reporting period and ended after the reporting period ended.



<sup>1</sup>There are some exceptions to this for the HPRP APR; this document does not include programming specifications for the HPRP APR.

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The instructions below illustrate one method for identifying records that were active in a reporting period. For the purposes of the APR, clients are selected based on both the [program entry date] (Data Standards 3.12) and [program exit date] (Data Standards 3.13). HPRP programs require that the client be active within the reporting period, according to the program entry and exit dates and presence of at least one HPRP financial assistance or service associated with the program stay and dated prior to the end of the report range.

Box 4.1 offers more sample code on how this logic was implemented in the *APR Reporting Tool*.

### 4.1 APR Reporting Tool Sample Logic: Filtering for the Reporting Period

#### Populate the *WorkEndDate* field.

```
=IF(OR(RecordEndDate="",AND(RecordEndDate>ReportEndDate,RecordStartDate<ReportEndDate),ReportEndDate,RecordEndDate)
```

- 1) Create a work field to be used for helping to control the record selection called *WorkEndDate*.
- 2) IF the *RecordEndDate* is null OR

the *RecordEndDate* is greater than the *ReportEndDate* AND the *RecordStartDate* is less than the *ReportEndDate*

THEN move the *ReportEndDate* into the *WorkEndDate* field.

ELSE

Move the *RecordEndDate* into the *WorkEndDate* field.

END

#### Populate the *WorkStartDate* field.

```
=IF(RecordStartDate<=ReportStartDate,WorkStartDate_SE=ReportStartDate,RecordStartDate)
```

- 1) Create a work field to be used for helping to control the record selection called *WorkStartDate*.
- 2) IF the *RecordStartDate* is less than the *ReportStartDate*, THEN move the *ReportStartDate* into the *WorkStartDate* field.

ELSE

IF the *RecordStartDate* is greater than the *ReportStartDate*, THEN move the *RecordStartDate* to the *WorkStartDate* field.

#### Select records with activity within the reporting period

```
=IF(RecordStartDate<=WorkEndDate,IF(AND(WorkEndDate_SE>=ReportStartDate,RecordEndDate_SE<=ReportEndDate),"Y","N"),"N")
```

- 1) If
  - a. *RecordEndDate* is greater than the *ReportEndDate* OR
  - b. *RecordEndDate* is blank AND
  - c. *WorkStartDate* is less than *ReportEndDate*

Then move "Y" to *WithinReportingPeriod*.

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### Definition of the Global Variables

This section describes derived elements that are used throughout both this document and the APR, referred to as *Global Variables*. Many of the widely applicable business rules of the APR are defined and explained in this section; whether or not a programmer chooses to use these particular variables in programming their own APR, reading this section is critical prior to beginning programming.

The variables described below should be generated sequentially, because, in many cases, variables described later use the derivations described earlier.

### Determining Which Questions are Relevant for the Program

*Global Variable Name* = ProgramType\_APRReport

Each question on the APR has been identified by HUD as being applicable to particular program types, such as SHP (which includes all SHP-funded programs), SHP-TH (limited to transitional housing programs), or S+C (Shelter Plus Care programs). Questions which do not apply to a particular program type will not be visible to users in *e-snaps* when completing the APR; the HMIS-generated APR may omit or leave blank questions that do not apply.

There is not a direct correlation between the HUD Data Standards [Program Type Code] (2.8) and the APR Program Applicability categories which identify which program types must complete it; however, the table below shows, for each program type code, which Program Applicability Categories to look for. For example, Homeless Outreach programs will need to complete all APR questions marked SHP, all questions marked SHP-SSO, and all questions marked SHP-SSO Outreach.

<i>Data Standards Program Type Code (2.8)</i>	<i>APR Program Applicability Categories</i>
1 = Emergency Shelter	n/a
2 = Transitional Housing	SHP, SHP-TH
3 = Permanent Supportive Housing	SHP, SHP-PH, S+C
4 = Homeless Outreach	SHP, SHP-SSO, SHP-SSO Outreach
5 = Homelessness Prevention and Rapid Re-Housing	HPRP
6 = Services Only program	SHP, SHP-SSO
7 = Other	n/a
8 = Safe Haven	SHP, SHP-SH
9 = Permanent Housing (e.g., Mod Rehab SRO, subsidized housing without services)	SHP, SHP-PH, SRO

Programmers may choose to use the program type code data element for determining program applicability. Alternatively, the filtering may be based on information entered by the user when the report is run. Question 3 on the APR, which is not covered by these specifications, requires programs to enter program information. This is what is used for determining the program applicability of questions when users are entering data in *e-snaps*.

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### Determining the Last Program Stay

*Global Variable Name = LastEpisode*

Most questions on the APR are based on information associated with a person's last program stay in the operating year. These include demographic questions, which should be based on information collected at the time of entry of the last program stay. Destination data and other data collected at exit are also based on exit data from a client's last program stay in the operating year, if the client's program exit date for the last program stay was within the operating year. (The APR does not report exit data for clients who were active in the program on the last day of the operating year, even if there is exit data from a previous program stay.) The *LastEpisode* variable identifies the program stay associated with the maximum [Program Entry Date] that is less than the Report End Date. For all programs, the last program entry date may be prior to the Report Start Date, if the client had no subsequent stays in the program, and the [Program End Date] is null or is greater than the Report Start Date. For services only programs, the [Program End Date] may also be *equal to* the Report Start Date.

#### **Box 5.1: APR Reporting Tool Sample Logic: Determining the Last Assessment**

Step 1. Sort all enrollments by *PersonalIdentificationNumber* and the program *EntryDate*.

Step 2. Check if the next consecutive record is for A) another client or B) beyond the reporting period.

a. If yes, then flag the records as *LastEpisode = Y*

### Determining Age Related Variables

Many elements of the APR require determining whether each client is an adult or a child. This determination is based on calculation of the client's age. For the purposes of the APR, each client has only one age, regardless of how many relevant program stays he or she might have. This age is calculated as of either the program entry date associated with the client's last program stay or the first day of the reporting period, whichever is later.

*Global Variable Name = AgeAtLastEntry*

If the [DateOfBirthQualityCode] is null or equal to 1 ("full date of birth reported") or 2 ("partial date of birth reported"), then the [Date of Birth] data should be considered trustworthy. Thus, if the [Date of Birth] is not null and the [DateOfBirthQualityCode] is not equal to "8-Don't Know" or "9-Refused" then use the [Date of Birth] to determine *AgeAtLastEntry*, as follows:

If the [Program Entry date] for the *LastEpisode* is prior to the start of the reporting period then subtract the client's [date of birth] from the reporting period start date to calculate *AgeAtLastEntry*. Otherwise subtract the [date of birth] from the program entry date of the *LastEpisode*. Use only the full year integer values of the age calculation and ignore any decimals. The *AgeAtLastEntry* for a client who is 17 years and 364 days old at last program entry is 17.

If the [Date of Birth] is null or the [DateOfBirthQualityCode] is equal to "8-Don't Know" or "9-Refused" then the *AgeAtLastEntry* is null.

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If your system can adjust for leap years and return the result in years you are all done, otherwise you can divide the difference in total days by 365.25 to derive an age at last program entrance. Using 365.25 is not as ideal as writing logic to calculate when a leap year falls but the margin of error is extremely minute. If you do wish to factor in the true number of leap years, know that leap years are every four years starting from 1900.

*Global Variable Name = AdultChild*

Determine if the client is an adult or child based on comparing AgeAtLastEntry to 18.

- If *AgeAtLastEntry* is greater than or equal to 18, then *AdultChild* = “Adult.”,
- If *AgeAtLastEntry* is less than 18, then *AdultChild* = “Child”,
- If *AgeAtLastEntry* is null, then *AdultChild* = “Unknown”.

Note: A final age-related determination (i.e. determining whether a client qualifies as an “adult or unaccompanied child,” requires determining whether clients are associated with other household members. Thus, this variable is described after determining a client’s household type.

### Determine Each Client’s Household Type

*Global Variable Name = HouseholdTypeClient*

Many questions categorize clients according to their household type.

The household types in the APR are as follows:

- **Household without Children** – A household that does not include any children, including unaccompanied adults, multiple adult households, and pregnant women not accompanied by other children. For the purposes of APR reporting, households without children that contain multiple persons should be counted as one (1) household without children.
- **Household with Children** – Any household with at least one child. There are two types of households with children:
  - **Households with children and adults** include households composed of at least two persons, one of whom is an adult and one is a child.
  - **Households with only children** are composed only of persons age 17 or under, including unaccompanied child, adolescent parents and their children, adolescent siblings, or other household configurations composed only of children.
- **Households with Unknown Configuration** – A household where missing date of birth information for one or more household members precludes the household from being categorized in any of the previous categories. A client whose date of birth is unknown may still have a known household type, if the other members of the household also include at least one adult and one child. Conversely, a household which does not include at least one known adult and one known child, and has at least one person with an unknown adult/child status will, of necessity, be a household of an unknown type.

The household type for a particular “Client X” is determined based on the complete list of clients who overlapped with Client X during Client X’s last program stay. Since clients in a household may not always be enrolled at the same time, each client’s household type must be determined independently. Not all household members will necessarily have the same household type.

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As an extreme example to illustrate the logic, consider the following sequence of events:

- Client X, whose age is unknown, and Client Y, an adult, enter a program together.
- Client Y exits.
- A few days later Client Z, a child, enters the program as a member of Client X's household.
- Client X and Z both exit.
- Later in the year, Client Z, still a child, re-enters the program alone.

Result:

- Client X is considered to be a client served in a household with children and adults, since during her last enrollment she was served with both an adult and a child.
- Client Y, who never overlapped with client Z, is considered to be a client who was served in a household of unknown type, since Client X may or may not have been a child.
- Client Z's last enrollment did not include any adults or people of unknown type. Client Z is categorized as a person served in a household with only children.

After determining each client's last enrollment per section 5.1, and adult/child status, per section 5.2, the next step is to determine whether each client overlapped with any adults, children, or person of unknown adult/child/unknown status. Then, you can assign a derived *HouseholdTypeClient* variable.

The values for *HouseholdTypeClient* in this documentation are:

- HHNoKids (Households Without Children)
- *AdultChild* (Households with Children and Adults)
- HHKidsOnly (Households with Only Children)
- Unknown (Households of Unknown Configuration)

Box 5.2 offers more detailed sample logic on how the *HouseholdClientType* was derived in the *APR Reporting Tool*.

*Global Variable Name = NumberInHousehold*

The number of persons in a client's household should also be determined based on the people with whom a particular client overlapped during his or her last enrollment. This variable is principally used as a building block to determine whether a client is an unaccompanied child in the next section.

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### Box 5.2: APR Reporting Tool Sample Logic: Determining a Client's Household Type

1. For each client, determine whether the client overlapped with adults, children, or persons of unknown age at last enrollment by performing the following:
  - A. Check for Adults:
    - A) Count the total number of adult episode records that have the same household ID [household identification number] (3.15) and store that result in field *AdultCount*.
    - B) Subtract from *AdultCount* any adult episode records that have an *ExitDate* prior to the *EntryDate* for the client's last enrollment.
    - C) Subtract from *AdultCount* any adult episode records that have an *EntryDate* after the *ExitDate* for the client's last enrollment.
    - D) If *AdultCount* is >0, set *HasAdults* to 1 to indicate the household has adults.
  - B. Check for Children:
    - A) Count the total number of children episode records with the same household ID and store the result in field *ChildCount*.
    - B) Subtract from *ChildCount* any children episode records that have an *ExitDate* prior to the *EntryDate* for the client's last enrollment.
    - C) Subtract from *ChildCount* any children episode records that have an *EntryDate* after the *ExitDate* for the client's last enrollment.
    - D) If *ChildCount* is >0, set *HasChildren* to 1 to indicate the household has children.
  - C. Check for Unknown:
    - A) Count the total number of age-unknown episode records with the same household ID and store the result in field *UnknownCount*.
    - B) Subtract from *UnknownCount* any unknown episode records that have an *ExitDate* prior to the *EntryDate* for the client's last enrollment.
    - C) Subtract from *UnknownCount* any unknown episode records that have an *EntryDate* after the *ExitDate* for the client's last enrollment.
    - D) If *UnknownCount* is >0, set *HasUnknown* to 1 to indicate the household has clients where it is unknown whether they are an adult or a child.
2. Determine household status based on the presence of adults, children and unknown members. This can be done by performing the following:
  - A) Create a work field that combines *HasAdultCount*, *HasChildren* and *HasUnknown* into one field, *HouseholdCode*, which can be used to assign the *HouseholdStatus*. Since 1 is used to indicate a positive indication and 0 indicates a negative, the following formula is one approach that can be used to accomplish this:
$$\text{HouseholdCode} = (\text{HasAdultCount} * 100) + (\text{HasChildren} * 10) + (\text{HasUnknown})$$

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B) Compare the HouseholdCode to the values listed below to determine the *HouseholdTypeClient* for the client during their last program stay.

Household Code	Adults	Children	Unknown	<i>HouseholdTypeClient</i>
1	0	0	> 0	Unknown
10	0	> 0	0	HHKidsOnly
11	0	> 0	> 0	Unknown
100	> 0	0	0	HHNoKids
101	> 0	0	> 0	Unknown
110	> 0	> 0	n/a	<i>AdultChild</i>
111	> 0	> 0	> 0	<i>AdultChild</i>

### Determine whether a client is an Adult or UnaccompaniedChild

*Global Variable Name = Unaccomp\_Child*

If the value assigned to *AdultOrChild* is "Child" and the *NumberInHousehold* is 1 (see Section 5.3) then indicate the client is an unaccompanied child by setting the value of this field to "Y".

*Global Variable Name = AdultOrUnChild*

If *AdultChild* is "Adult" OR if *UnaccompChild* is "Y" then .set the value of this field to "Y".

### Count Distinct Households and Determine Household Types

As household compositions can change over time, the logic for determining what constitutes an additional, distinct household as well as the logic for categorizing these households by type can be complex. Since the last program stay for various members of a single household may not be the same program stay, we do not define the household type based on the last program stay as we do for individual clients. Rather, households are categorized based on all persons associated with a household over the entire reporting period.

A new household should only be counted if none of the adults in the household have been served before within the reporting period. If the household does not have an adult member, the group should be considered a new household only if the membership of the household differs from any configuration during a prior program stay. Note that this may effectively combine different [household identification numbers] together into one master household based on individuals' program stays which are relevant in the report date range.

This documentation explains how to define what is referred to as a *master household*. The master household is used to count total households served during the operating year. The *MasterHousehold*

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variable is not used when determining an individual's household type, only when reporting a count of households.

*Global Variable Name = MasterHousehold*

The general approach to counting households can be implemented using the following rules:

1. For households in which each member has only one program stay during the operating year, count one household and define the household type based on all members who were present during the operating year.
2. For households in which one or more members have more than one program stay during the operating year:
  - a. Consider all program stays in the operating year chronologically
  - b. If an identical group of people are served together on multiple program stays, count only one household.
  - c. If an adult who has been served previously in the operating year re-enters the program later in the operating year, a new household is not created. The adult and any persons served with him/her on both stays are counted as one household.
  - d. If two adults were served by the program earlier in the operating year in separate households on separate stays, and subsequently return to the program together for a third stay, two households should be counted. Each of the two original households will be counted because at the time of entry neither had adults who had been previously served. The third stay is not counted as a new household, because it contains one or more adults who were previously served; instead, the household members from the third program stay are joined to the household that appeared earliest in the operating year.

Based on these rules, each client may be included in more than one master household. However, a person will only have one master household for any one program stay. Therefore, the *MasterHousehold* variable should be associated with a distinct program stay record rather than on a one-to-one basis with the client.

*Global Variable Name = MasterHouseholdType*

Like a client's household type, each *MasterHousehold* is associated with a single *MasterHouseholdType*. However, unlike the client's household type, which is based on the client's *LastEpisode*, the *MasterHouseholdType* should be tabulated based on all clients included in the *MasterHousehold* at any point.

Use the following rules to derive a *MasterHouseholdType* for a *MasterHousehold*

1. Consider all members of the *MasterHousehold* when determining household type, regardless of whether they overlapped with one another. As noted above, a particular client may be counted in more than one *MasterHousehold*.
2. Count as follows:

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1. *Household Without Children* – single adult persons, or adults with adult companions that have never had a child in their household.
2. *Households with Children and Adults* – any household with at least one adult and one child.
3. *Households with Only Children* – any household where all persons are younger than age 18 at last program entry.
4. *Unknown Household Type* – households that cannot be classified because one or more household members are missing date of birth data. Note that in instances where the household contains at least one known adult and one known child, the household type can be determined even if other household members are missing date of birth data.(See example 2)

Below are two examples for counting households and determining *MasterHouseholdType*.

### *Example 1:*

Two program entries and associated program exits in the same operating year

Program stay 1) Mom (adult) and Billy, age 10;

Program stay 2) Mom (adult) and Boyfriend (adult).

- Total households = 1. The second intake included at least one adult who was previously served in the prior enrollment.
- Household configuration during operating year is Household with Children and Adults. Even though the last program stay only included adults, over the entire period, the household included both adults and children.

### *Example 2:*

Program stay 1) Linda (missing DOB) and Tom (adult) enter a program together. Tom leaves. Annie (a child) joins Linda.

Program stay 2) Later in the operating year, Tom and Linda return to the program.

Program stay 3) Later in the operating year, Tom returns to the program alone.

- Total households = 1, Household with Children and Adults.
  - If Tom and Linda were assigned Household ID 100 at the time they entered the program, Annie is also assigned Household ID 100 when she joins Linda.
  - As we move through a list of program stays in chronological order and arrive at Tom and Linda's second program stay, we consider them to be part of Household 100 because Tom is an adult who was served previously in the operating year. The same rule applies for Tom's third stay. In effect, all three program stays have a *MasterHousehold* of 100.

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- The household type of Household 100 is *Household With Children and Adults*. Although the only persons for whom we have DOB data did not have overlapping stays, the household type is based on everyone included in the *MasterHousehold*.

### Box 5.3: Counting MasterHouseholds and Determining MasterHouseholdTypes

The following is a recommended programming sequence for Counting MasterHouseholds and Determining MasterHouseholdTypes:

1. Find everyone relevant for the report section (based on entry/exit dates).
2. Determine their APR age.
3. Examine household IDs and program entry and exit dates for members of each household to understand all members of the household for each stay.
4. Build “umbrella” households chronologically:
  - a. Any grouping of people that is identical to a previous grouping of people (regardless of age) is the same household.
  - b. For each program stay, household members should be added to the 1<sup>st</sup> household in which any of the adult members appeared (thus creating a temporary merge grouping where everyone is linked together).
5. Identify the household type based on the members comprised within the MasterHousehold.

### Determine Length of Stay (LOS)

*Global Variable Name = LengthOfStay*

Every program stay has a LengthOfStay. The method of calculation of *LengthOfStay* depends on whether or not the program is a residential program.

***For residential programs***, LengthOfStay refers to the number of nights the client spent in the program. A client who enters a residential program on March 1 and exits the following day has a length of stay of 1 night.

- a) *If the program exit date is on or before the ReportEndDate*, then the LengthOfStay calculation is simply the ProgramExitDate minus the ProgramEntryDate.
- b) *If the program exit date is blank or after the last day of the operating year*, then the LengthOfStay calculation is (*ReportEndDate + 1 day*) minus the *Program EntryDate*. The reason for the addition of one day to the *ReportEndDate* is that it is appropriate to include the last night in the *LengthOfStay* if the client did not exit before the end of the reporting period.

***For non-residential programs***, LengthOfStay refers to the number of days a client spent in the program. A client who enters a non-residential program on March 1 and exits the following day has a LengthOfStay of 2 days.

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- a) *If the program exit date is on or before the ReportEndDate, then the LengthOfStay calculation is simply the (ProgramExitDate + 1 day) minus the ProgramEntryDate.*
- b) *If the program exit date is blank or after the last day of the reporting period, then the LengthOfStay calculation is the (ReportEndDate + 1 day) minus the Program EntryDate.*

*Global Variable Name = LengthOfStay\_Total*

Each client will have a *LengthOfStay\_Total*, which is comprised of the total number of days / nights a client spent in the program *during* the operating year. It includes days / nights from all program stays within the operating year, and is limited to days / nights within the operating year. This variable is used to calculate the *Average Number of Persons Served Each Night* for question 8b.

To calculate *LengthOfStay\_Total* for each client, we will first calculate an intermediate variable, *LengthOfStay\_Limited*, for each program stay. As the name implies, *LengthOfStay\_Limited* is distinct from *LengthOfStay* in that it is limited to days / nights within the operating year. To determine *LengthOfStay\_Limited* for each program stay, first determine *LengthOfStay*.

- a) *If the program entry date is on or after the ReportStartDate, then the LengthOfStay\_Limited = LengthOfStay.*
- b) *If the program entry date is prior to the ReportStartDate, then the LengthOfStay\_Limited = LengthOfStay – (ReportStartDate – ProgramEntryDate).*

For each client, *LengthOfStay\_Total* is the sum of each of his/her *LengthOfStay\_Limited* values.

### **Categorize Clients as Leavers or Stayers**

*Global Variable Name = LeaverOrStayer*

Several questions on the APR apply only to leavers or to stayers. A leaver is a person who was served by the program during the operating year but exited on or before the last day of the operating year. A stayer is a person who was active in the program on the last day of the operating year, i.e. the program exit date for the client's last program stay is either blank or after the last day of the operating year.

The determination of whether a person is a "leaver" or a "stayer" is based on the last program stay (*LastEpisode="Y"*). If the Exit Date of the *LastEpisode* is not blank AND the Exit Date is less than or equal to the report end date then the client is a leaver (use code "L"), otherwise they are a stayer (use code "S").

### **Determine Which Records to Use for Reporting**

*Global Variable Name = EntryExit*

Several of the questions on the APR are based on the value of a field as of program entry or exit. The HUD HMIS Data Standards dictate that certain data, such as income and disabling conditions, must be collected at program entry, program exit, at annual follow-ups, or all three, but the Data Standards do not prescribe how to identify this data as being collected at program entry, program exit, or follow-up.

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It is assumed here that each HMIS system has a method for associating data with a particular program stay and a method for identifying the stage at which the data was collected.

For the purposes of these specifications, records where the record date is equal to the *LastEntryDate* are assigned the value of “Entry”, those that match the *LastExitDate* are assigned “Exit” and those that do not match either are assigned the value of “Neither”. *LastEntryDate* is simply the Entry Date where *LastEpisode* is equal to “Y” and *LastExitDate* is the ExitDate of that same record.

*Global Variable Name = MostRecentAssessment*

This variable is used to flag the record that is the nearest to the end of the operating year for questions related to disabling conditions, income, and non-cash benefits. The most recent assessment may be an exit assessment for those who have exited, a follow-up assessment for stayers who were in the program long enough to have follow-up data, or an entry assessment for those who have not stayed in the program long enough for a follow-up assessment, or for whom exit or follow-up data are missing.

Note: The *MostRecentAssessment* variable is dependent on the structure of the ClientHistorical file of the HUD HMIS CSV Export; a similar methodology could be used in systems that store data differently to identify for each client the most recent data related to APR questions for which it is relevant to do so.

*Global Variable Name = MostRecentIncBen*

This field is used is to indicate whether or not a record of the client’s specific income sources and/or non-cash benefits is the most recent record of this type for this client during the operating year.

### ***Box 5.4 Sample Programming Logic for Assigning MostRecentIncBen Based on the HUD CSV Format***

1. Sort the income and/or benefits table by ClientID, IncomeBenType, IncomeBenSourceCode, and the date of the income or benefit.
2. The ClientID, IncomeBenType, IncomeBenSourceCode, and the date of the income or benefit should then be compared with the previous record. If any of these are different than the values for the previous record then indicate that this is the first service record of this type for this client by setting a work field, FirstIncBen, to "Y", otherwise set it to "N".
3. To set the MostRecentIncBen variable, loop through the table again and set the flag to “Y” if the value of FirstIncBen for the next record is “Y”.

Note: The *MostRecentIncBen* variable is dependent on the structure of the IncomeBenefits file of the HUD HMIS CSV Export; a similar methodology could be used in systems that store data differently to identify for each client the most recent data related particular sources of income and types of non-cash benefits.

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### **Count Disabling Conditions and Check the Data Quality**

The HMIS Data Standards contain both a Universal Data Element question about whether a client has any disabling condition, as well as program-specific questions related to particular disabilities. All of these fields should be referenced in questions determining whether each client has a disabling condition.

To determine whether a client has any disability, first check program specific fields and count the number of specific conditions recorded (see *NumberOfConditions* variable.). If there are no specific conditions recorded, use the response to the [Disabling Condition] (3.8) Universal Data Element to determine whether the client should be counted as having a disability but without a known specific condition, no disability, don't know, refused, or missing. This sequence of operations means that "yes" answers for any specific condition will take precedence over the response to the universal disabling condition field.

*Global Variable Name = NumberOfConditions*

Add 1 to this count any records where [substance abuse] (4.8) is equal to "1" (Alcohol abuse) or "2" (Drug abuse), and add 2 to this count for any record where [substance abuse] equals 3 (Both alcohol and drug abuse). Add 1 to this count for any other program specific disabilities where the response is equal to "1" ("yes"). These include [physical disability] (4.3), [developmental disability] (4.4), [chronic health condition] (4.5), [HIV/AIDS] (4.6), and [mental health] (4.7).

*Global Variable Name = DisabledStatus\_DataQual*

Based on the *MostRecentAssessment*:

- If [disabling condition] is 1, yet the *NumberOfConditions* is zero, then mark the field as "Unknown" indicating that there is a disability but the specific type is unknown.
- If [disabling condition] is 8 or 9, and the total number of disabilities is 0, then mark the field as "Don't Know".
- If [disabling condition] is blank and the total number of disabling conditions is 0 then mark this field as "Missing".
- If none of these conditions apply then set the value of this field as "GoodRec".

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### Report Details

#### APR Q7: HMIS or Comparable Database Data Quality

APR.xlsx, Sheet Name: Q7

Total number of applicable records for All Clients	
Total number of applicable records for Adults Only	
Total number of applicable records for Unaccompanied Children	
Total number of applicable records for Leavers	

Data Element	Don't Know or Refused	Missing Data
First Name		
Last Name		
SSN		
Date of Birth		
Race		
Ethnicity		
Gender		
Veteran Status		
Disabling Condition		
Residence Prior to Entry		
Zip of Last Permanent Address		
Housing Status (at entry)		
Income (at entry)		
Income (at exit)		
Non-Cash Benefits (at entry)		
Non-Cash Benefits (at exit)		
Physical Disability (at entry)		
Developmental Disability (at entry)		
Chronic Health Condition (at entry)		
HIV/AIDS (at entry)		
Mental Health (at entry)		
Substance Abuse (at entry)		
Domestic Violence (at entry)		
Destination		

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### Business Rules

1. Use data from each client's last program stay in the operating year.
2. There should be a maximum of one [date of engagement] (4.12) per program stay. In the event that there is more than one date of engagement recorded for a single program stay, use the earliest recorded date of engagement.
3. For Outreach programs, only count clients who were actually engaged during their last program stay and prior to the end of the operating year. For example:
  - a. An Outreach client with exactly one program stay active during the operating year who did not have a date of engagement would not be counted in this section.
  - b. A client with a program stay active during the operating year, but who had a date of engagement *after* the operating year would not be included, either.
  - c. A client with a program stay active during the operating year who had a date of engagement affiliated with that program stay, but dated *prior* to the operating year, would be included in this section.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	HUD CSV REF	HUD CSV Table	HUD Data Standards Reference
DateOfBirth	9/I	Client	3.3A
DateOfBirthQualityCode	10/J	Client	3.3B
Ethnicity	13/M	Client	3.5
FirstName	3/C	Client	3.1
Gender	14/N	Client	3.6
LastName	5/E	Client	3.1
PrimaryRace	11/K	Client	3.4
SecondaryRace	12/L	Client	3.4
SSN	7/G	Client	3.2A
SSNQualityCode	8/H	Client	3.2B
ChronicHealth	14/N	ClientHistorical	4.5A
ChronicHealthService	15/O	ClientHistorical	4.5B
DevDisability	12/L	ClientHistorical	4.4A
DevDisabilityService	13/M	ClientHistorical	4.4B
DV	24/X	ClientHistorical	4.9A
DVOccurred	25/Y	ClientHistorical	4.9B
HIV_AIDS	16/P	ClientHistorical	4.6A
HIV_AIDSServices	17/Q	ClientHistorical	4.6B
IncomeLast30	8/H	ClientHistorical	4.1C
MentalHealth	18/R	ClientHistorical	4.7A
MentalHealthServices	20/T	ClientHistorical	4.7C
NonCashLast30	9/I	ClientHistorical	4.2A

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PhysDisability	10/J	ClientHistorical	4.3A
PhysDisabilityService	11/K	ClientHistorical	4.3B
ProgramType	8/H	AgencyProgram	2.8
SubstanceAbuse	21/U	ClientHistorical	4.8A
SubstanceAbuseServices	23/W	ClientHistorical	4.8C
Destination	17/Q	ProgramParticipation	4.10
Disability	9/I	ProgramParticipation	3.8
HousingStatusAtEntry	14/N	ProgramParticipation	3.11
PriorResidence	10/J	ProgramParticipation	3.9A
ProgramExitDate	6/F	ProgramParticipation	3.13
Veteran	8/H	ProgramParticipation	3.7
ZipCode	12/L	ProgramParticipation	3.10A
ZipQuality	13/M	ProgramParticipation	3.10B
ClientEngaged	19/S	ServiceEvent	4.12

### **Global Variables**

1. *AdultChild*
2. *Unaccomp\_Child*
3. *AdultOrUnChild*
4. *EntryExit*
5. *LastEpisode*
6. *LeaverOrStayer*

### **Local Variables**

*Outreach\_ActiveClient* - Used for reporting for outreach programs to determine whether or not the client is to be included within the data universe for Q7. The universe is to include only outreach clients that were engaged on or before the last day of the reporting period ([date of engagement] (4.12) <= *ReportingEndDate*) during their last program stay (*LastEpisode* = "Y"). If the record meets this criteria then set the *Outreach\_ActiveClient* local variable to "Y", otherwise set it to "N". (Note that this is different than the logic used to determine the data universe for Q12; see Q12 for details.)

### **Program Applicability**

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

### **Program Type Codes**

Program Type = 2, 3, 4, 5, 6, 8, or 9

## HUD Annual Performance Report (APR) Programming Specifications

### Programming Logic

Check the *\_ProgramType\_APRReport* field to determine if the report is being run for an outreach program. (*ProgramType\_APRReport* = "SHP-SSO Outreach") If it is, then only include clients that have had a record of being engaged (*Outreach\_ActiveClient* = "Y") during their last program stay (*LastEpisode* = "Y").

1. Determine the total number of applicable records for each field as follows:
  - A) *Total number of Clients* = All clients that are active within the reporting period.
  - B) *Total number of Adults* = All client that were adults (*AdultChild*= "Adult").
  - C) *Total number of Unaccompanied Children*= All clients that were unaccompanied children (*Unaccomp\_Child*= 1).
  - D) *Total number of Leavers* = All clients that were "leavers" (*LeaverOrStayer*= "L") on the client's last program stay (*LastEpisode*= "Y").
  
2. Determine the total number of Don't Know/Refused as follows:
  - A) *SSN* = Count all applicable records where the client did not know or refused to give their Social Security Number (*SSNQualityCode* = 8 or 9) AND the SSN is blank. If the SSN is entered, and the *SSNQualityCode* is 8 or 9, count this as complete.
  - B) *Date of Birth* = Count all applicable records where the client did not know or refused to give their Date of Birth (*DateOfBirthQualityCode* = 8 or 9) AND the Date of Birth is blank. If the *DateOfBirth* is entered, and is not partial, yet the *DateOfBirthQualityCode* is 8 or 9, still count this as complete.
  - C) *Race* = Count all applicable records where the client did not know or refused to give their Race. If data are collected in separate fields for each record, and a client has at least one race value recorded that is not equal to "8" or "9," consider this record complete, and do not count the client in this column.
  - D) *Ethnicity* = Count all applicable records where the client did not know or refused to give their Ethnicity (*Ethnicity* = 8 or 9)
  - E) *Gender* = Count all applicable records where the client did not know or refused to give their gender (*Gender* = 8 or 9)
  - F) *Veteran Status* = Count all applicable records where the client was an adult (*AdultChild* = "Adult"), and they did not know or refused to give their veteran status (*Veteran* equals 8 or 9) at their last program stay (*LastEpisode* = "Y").

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- G) *Disabling Condition* = Count all applicable records where the client did not know or refused to give their disabled status (Disability equals 8 or 9) at their last program stay (*LastEpisode* = "Y").
- H) *Residence Prior to Program Entry* = Count all applicable records where the client was an adult or unaccompanied child (*AdultOrUnChild* = "Y") and did not know or refused to give their prior residence (PriorResidence equals 8 or 9) at their last program stay (*LastEpisode* equals "Y").
- I) *Zip Code of Last Permanent Address* = Count all applicable records where the client was an adult or an unaccompanied child (*AdultOrUnChild* = "Y") and did not know or refused to give their zip code of last permanent address (ZipQuality = 8 or 9) at their last program stay (*LastEpisode* = "Y"), and the actual zip code field is null. If there is data in the zip code field, count this record as complete.
- J) *Housing Status (at entry)* = Count all applicable records where the client did not know or refused to give their entry housing status (HousingStatusAtEntry = 8 or 9) at their last program stay (*LastEpisode* = "Y").
- K) *Income and Sources (at entry)* = Count all records where the client did not know or refused to give their income (IncomeLast30 equals 8 or 9) at entry (*EntryExit* = "Entry") at their last program stay (*LastEpisode* = "Y").
- L) *Income and Sources (at exit)* - Count all records for leavers (*LeaverOrStayer*="L") where the client did not know or refused to give their income (IncomeLast30 equals 8 or 9) at exit (*EntryExit* = "Exit") from their last program stay (*LastEpisode* = "Y").
- M) *Non-Cash Benefits (at entry)* = Count all records where the client did not know or refused to give their non-cash benefits (NonCashLast30 equals 8 or 9) at entry (*EntryExit* = "Entry") of their last program stay (*LastEpisode* = "Y").
- N) *Non-Cash Benefits (at exit)* = Count all records for leavers (*LeaverOrStayer*="L") where the client did not know or refused to give their non-cash benefits (NonCashLast30 equals 8 or 9) at exit (*EntryExit* = "Exit") of their last program stay (*LastEpisode* = "Y").
- O) *Physical Disability* = Count all records where the client did not know or refused to give their physical disability status (PhysDisability = 8 or 9) at entry (*EntryExit* = "Entry") of their last entry (*LastEpisode* = "Y").
- P) *Developmental Disability* = Count all records where the client did not know or refused to give their developmental disability status

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- (DevDisability = 8 or 9) at entry (*EntryExit* = "Entry") of their last program stay (*LastEpisode* = "Y").
- Q) *Chronic Health Condition* = Count all records where the client did not know or refused to give their chronic health condition (*ChronicHealth* = 8 or 9) at entry (*EntryExit* equals "Entry") of their last program stay (*LastEpisode* equals "Y").
  - R) *HIV/AIDS* = Count all records where the client did not know or refused to give their HIV / AIDS status (*HIV\_AIDS* equals 8 or 9) at entry (*EntryExit* equals "Entry") of their last program stay (*LastEpisode* equals "Y").
  - S) *Mental Health* = Count all records where the client did not know or refused to give their mental health status (*MentalHealth* equals 8 or 9) at entry (*EntryExit* equals "Entry") of their last program stay (*LastEpisode* equals "Y").
  - T) *Substance Abuse* = Count all where the client did not know or refused to give their substance abuse status (*SubstanceAbuse* = 8 or 9) at entry (*EntryExit* = "Entry") of their last program stay (*LastEpisode* = "Y").
  - U) *Domestic Violence* = Count all records where the client is an adult or unaccompanied child (*AdultUnChild*= "Y") and they refused to give their domestic violence status (*DV* = 8 or 9) at entry (*EntryExit* = "Entry") of their last program stay (*LastEpisode* = "Y").
  - V) *Destination* = Count all records for leavers (*LeaverOrStayer*="L") who did not know or refused to give their destination (*Destination* = 8 or 9) at their episode (*LastEpisode* = "Y").
3. Determine the total missing records as follows:
- A) *First Name* = Count all applicable records where there is no information for first name (*FirstName* is blank).
  - B) *Last Name* = Count all applicable records where there is no information for last name (*LastName* is blank).
  - C) *SSN* = Count all applicable records where there is no information for Social Security Number (*SSN* is blank) and the *SSNQuality* code is not 8 or 9.
  - D) *Date of Birth* = Count all applicable records where there is no information for date of birth (*DateOfBirth* is blank) and the *DateOfBirthQualityCode* is not 8 or 9.
  - E) *Race* = Count all applicable records where there is no information for any race.
  - F) *Ethnicity* = Count all applicable records where there is no information for ethnicity (*Ethnicity* is blank).

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- G) *Gender* = Count all applicable records where there is no information for gender (Gender is blank).
- H) *Veteran Status* = Count all applicable records where the client is an adult (*AdultChild* = "Adult") and there is no information for veteran (Veteran is blank) at the client's last program stay (*LastEpisode* = "Y").
- I) *Disabling Condition* = Count all applicable records where there is no information for disabling condition (Disability is blank) at the client's last program stay (*LastEpisode* = "Y").
- J) *Residence Prior to Program Entry* = Count all applicable records where there is no information for prior residence (PriorResidence is blank) at the client's last program stay (*LastEpisode* = "Y").
- K) *Zip Code of Last Permanent address* = Count all applicable records where the client is an adult or unaccompanied child (*AdultOrUnChild* = "Y") and at the last program stay (*LastEpisode* = "Y") there is no information for zip code (ZipCode is blank) and the client ZipQuality code is not 8 or 9.
- L) *Housing Status (at entry)* = Count all applicable records where there is no information for entry status (HousingStatusAtEntry is blank) at the client's last program stay (*LastEpisode* = "Y").
- M) *Income Sources (at entry)* = Count all applicable records where there is no information for income (IncomeLast30 is blank) at entry (*EntryExit* equals "Entry") at the client's last program stay (*LastEpisode* = "Y").
- N) *Income Sources (at exit)* = Count all applicable records where the client left during the reporting period (*LeaverOrStayer* = "L") and there is no information for income (IncomeLast30 is blank) at exit (*EntryExit* = "Exit") at the client's last program stay (*LastEpisode* = "Y").
- O) *Non-Cash Benefits (at entry)* = Count all applicable records where there is no information for non-cash benefits (NonCashLast30 is blank) at entry (*EntryExit* = "Entry") at the client's last program stay (*LastEpisode* = "Y").
- P) *Non-Cash Benefits (at exit)* = Count all applicable records where the client left during the reporting period (*LeaverOrStayer* = "L") and there is no information for non-cash benefits (NonCashLast30 is blank) at exit (*EntryExit* = "Exit") at the client's last program stay (*LastEpisode* = "Y").
- Q) *Physical Disability* = Count all records where at the client's last entry (*LastEpisode* = "Y") there is no information for physical disability status (PhysDisability is blank) at entry (*EntryExit* = "Entry").

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- R) *Developmental Disability* = Count all records where at the client’s entry (*EntryExit* = “Entry”) of their last program stay (*LastEpisode* = “Y”) there is no information for developmental disability (*DevDisability* is blank).
- S) *Chronic Health Condition* = Count all records where at the client’s entry (*EntryExit* = “Entry”) of their last program stay (*LastEpisode* = “Y”) there is no information for chronic health condition (*ChronicHealth* is blank).
- T) *HIV/AIDS* = Count all records where at the client’s last entry (*EntryExit* equals “Entry”) of their last program stay (*LastEpisode* equals “Y”) there is no information for HIV / AIDS status (*HIV\_AIDS* is blank).
- U) *Mental Health* = Count all records where at the client’s entry (*EntryExit* equals “Entry”) of their last program stay (*LastEpisode* equals “Y”) there is no information for mental health status (*MentalHealth* is blank).
- V) *Substance Abuse* = Count all records where at the client’s entry (*EntryExit* = “Entry”) of their last program stay (*LastEpisode* = “Y”) there is no information for substance abuse status (*SubstanceAbuse* is blank).
- W) *Domestic Violence* = Count all applicable records where the client is an adult or unaccompanied child (*AdultUnChild* = “Y”) and there is no information for domestic violence survivor (*DV* is blank) at entry (*EntryExit* equals “Entry”) of their last program stay (*LastEpisode* = “Y”).
- X) *Destination* = Count all applicable records where during the client’s last program stay (*LastEpisode* equals “Y”) the client left (*LeaverOrStayer* = “L”) and there is no information for destination (*Destination* is blank).

### APR Q8: Persons Served During the Operating Year by Type

APR.xlsx, Sheet Name: Q8

**Number of Persons in Households Served During the Operating Year**

	Total	Without Children	With Children and Adults	With only Children	Unknown Type
Adults					
Children					
Don’t Know/Refused					
Information Missing					
<b>Total</b>					

**Average Number of Persons Served Each Night**

	Total	Without Children	With Children and Adults	With only Children	Unknown Type

## HUD Annual Performance Report (APR) Programming Specifications

Average Number of Persons					
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### Point-in-Time Count of Persons on the Last Wednesday in

	Total	Without Children	With Children and Adults	With only Children	Unknown Type
January					
April					
July					
October					

### Business Rules

1. Report the total number of persons served during the operating year; average number of persons served each night; and point-in-time number of persons served on the last Wednesday in January, April, July, and October. Information on persons served must be reported in total and by household type.
2. For question 8b, calculate the average number of persons served each night during the operating year by dividing the total number of nights of service among all persons served during the operating year by the total number of nights during the operating year. The total number of nights of service can be calculated using the program entry and exit dates for each stay a person has in the program. For example, if a person enters a unit on January 7 and exits during the day on January 10, the person has been provided three nights of service (January 7, January 8, and January 9). Nights of service provided before the start of the operating year or after the end of the operating year should be excluded. The total number of nights among all persons is equal to the sum of nights across all persons served during the operating year. For example, if Client A stayed 365 nights, Client B stayed 300 nights, and Client C stayed 65 nights, the total would be 730 nights. The sum of the number of nights should be divided by the total number of nights in the operating year to derive the number of persons served on an average night. In the example above, if the operating year is 365 nights, then average number of persons served on a given night is 2 (i.e. 730/365).
3. For question 8c, report the total number of persons served during the twenty-four hour period occurring on the last Wednesday in January, April, July, and October. If completing an extension APR that covers a period less than a full calendar year, report information only for the point-in-time dates that fall within the extension period.
4. For Questions 8b and 8c, SSO programs should count persons as served on both their entry and their exit dates. Residential programs should not count the exit date as a day served. For example, a residential client who entered the program on the last Tuesday in January and exited on the next day (Wednesday) should be counted as served for one night, and should not be counted in the point-in-time count for the last Wednesday in January.

### Programming Instructions

#### *Variables Used*

#### *Fields Referenced from the HUD HMIS Data Standards*

## HUD Annual Performance Report (APR) Programming Specifications

Primary Field Name	HUD CSV REF	HUD CSV Table	HUD Data Standards Reference
DateOfBirth	9/I	Client	3.3A
DateOfBirthQualityCode	10/J	Client	3.3B
EntryDate	5/E	ProgramParticipation	3.12
ExitDate	6/F	ProgramParticipation	3.13

### Global Variables

1. *AdultChild*
2. *LengthOfStay\_Total*
3. *HouseholdTypeClient*

### Local Variables

*NumOfDaysInReportPeriod* - This is used to determine the average number of persons served during the reporting period for question 8b. The calculation for total days is equal to the ReportEndDate minus the ReportStartDate

### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

### Program Type Codes

Program Type = 2, 3, 4, 5, 6, 8, or 9

### Programming Logic

Each **column** represents a different household type. Count the total number of persons in each type, based on the *HouseholdTypeClient* global variable.

### (8a) Persons Served During the Operating Year by Household Type

Each **row** represents the adult/child status of the clients

1. Adults = All persons where *AdultChild* = "Adult".
2. Children = All persons where *AdultChild* = "Child".
3. Don't Know/Refused = All persons where *AdultChild* = "Unknown", and the DateOfBirthQualityCode equals 8 or 9.
4. Information Missing = All persons where *AdultChild* = "Unknown" and the DateOfBirthQualityCode does not equal 8 or 9.

## HUD Annual Performance Report (APR) Programming Specifications

### (8b) Average Number of Persons Served Each Night

The average number of persons served each night is calculated by taking the sum of the *LengthOfStay\_Total* for all clients and dividing this figure by the total number of days within the reporting period. The average for a particular household type uses the same logic except it is based on just the particular *HouseholdTypeClient* that corresponds to the reporting column. Because each client has only one *HouseholdTypeClient* value (that of their final relevant program stay), an individual's total length of stay will be calculated using that household type regardless of how many other household configurations he/she may have appeared with during the operating year.

### (8c) Point-in-Time Count During Operating Year

For residential programs, if the *EntryDate* for an enrollment record is on or before the point-in-time date AND the *ExitDate* *is after* the point-in-time date OR null, then indicate the client was present on that date by counting the client.

For SSO programs, if the *EntryDate* for a record is on or before the point-in-time date AND the *ExitDate* *is on or after* the point-in-time date OR null, then indicate the client was present on that date by counting the client.

Use each client's *HouseholdTypeClient* value to report that person in the appropriate household configuration column. Again, since each client has only one calculated *HouseholdTypeClient* value, he/she may be reported under a different household configuration than what he/she was actually in on the point-in-time date.

## APR Q9: Households Served During the Operating Year

APR.xlsx, Sheet Name: Q8&9

**Number of Households Served During the Operating Year**

	Total	Without Children	With Children and Adults	With only Children	Unknown Type
Households					

**Point-in-Time Count of Households Served on the Last Wednesday in**

	Total	Without Children	With Children and Adults	With only Children	Unknown Type
January					
April					
July					
October					

### Business Rules

Question 9 relies heavily on the *MasterHousehold* global variable that is to be assigned to each member of a common household. The episodes of each client assigned to the

## HUD Annual Performance Report (APR) Programming Specifications

*MasterHousehold* are compared to the four point-in-time dates to determine whether or not to count the household as being present for the date of the count.

1. Report the total number of households served during the operating year and the point-in-time number of households served on the last Wednesday in January, April, July, and October. Information on households served must be reported in total and by household type.
2. The “Total number of households” column is an unduplicated count of distinct households served during the operating year.
3. A new household should only be counted if none of the adults in the household have been served before within the reporting period, or, if the household does not have an adult member, the group should be considered a new household if the membership of the household differs from any configuration during a prior program stay.
4. Base the final household type (“Households without children”, “Households with adults and children”, etc.) on all the members ever associated with the master household.
5. Only one distinct household should be counted within the “Total number of households,” “Households without children,” or “Households with at least one adult and one child” and “Households with only children” columns, regardless of how many program stays the household experiences during the operating year. For example, if a woman and child exit the program and re-enter during the same operating year, they would not be double counted in either the “Total number of households” or “Households with children” columns.

Report the total number of distinct households served during the twenty-four hour period occurring on the last Wednesday in January, April, July, and October. If completing an extension APR that covers a period less than a full calendar year, report information only for the point-in-time dates that fall within the extension period.

SSO programs should count households as served on both their entry and their exit dates. Residential programs should not count the exit date as a day served, e.g. households that enter the program on the last Tuesday in January and exit on the next day (Wednesday) should be counted as served for one night, and should not be counted in the point-in-time count for the last Wednesday in January.

### Programming Instructions

#### *Variables Used*

#### *Fields Referenced from the HUD HMIS Data Standards*

Primary Field Name	HUD CSV REF	HUD CSV Table	HUD Data Standards Reference
EntryDate	5/E	ProgramParticipation	3.12
ExitDate	6/F	ProgramParticipation	3.13

#### *Global Variables*

1. *MasterHousehold*
2. *MasterHouseholdType*

## **HUD Annual Performance Report (APR) Programming Specifications**

### **Programming Logic**

#### ***(9a) Total number of households served at any time during the operating year***

The *MasterHouseholdType* global variable is used to determine the counts for this field. It is important to ensure that each *MasterHousehold* is only counted once, regardless of how many clients are members of the household.

### **Program Applicability**

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

#### ***(9b) Point-in-Time Count During Operating Year***

For residential programs, count all households present on a date based on whether the *EntryDate* for any record with the *MasterHousehold* identifier assigned is on or before the point-in-time date AND the *ExitDate* is after the point-in-time date OR null. For SSO programs, if the *EntryDate* for a record is on or before the point-in-time date AND either the *ExitDate* is on or after the point-in-time date OR null, then count the household as present on that date.

The count of clients served on a particular date for a particular household type uses the same logic except it is based on just for records where the *MasterHouseholdType* corresponds to the reporting column.

### **Program Applicability**

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

### **APR Q10: Bed Utilization Rate**

NOTE: Programs will not need to enter any data for this question. Answers will be derived in *e-snaps* upon entering other data. However, HMIS vendors may choose to generate this question for validation purposes.

APR.xlsx, Sheet Name: Q10&11

## HUD Annual Performance Report (APR) Programming Specifications

### Bed Utilization Rate

Average daily utilization rate during the operating year	0%
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### Point-in-Time bed utilization rate on the last Wednesday in

January	0%
April	0%
July	0%
October	0%

### Q10a: Average daily bed utilization rate during the operating year

#### Business Rules

1. For question 10a, the average daily utilization rate is automatically calculated based on the total average night count of persons served (Question 8b) divided by the total number of year-round individual and family beds in the project (Question 5).

#### Programming Instructions

##### *Program Applicability*

1. SHP-TH
2. SHP-PH
3. SHP-SH
4. S+C
5. SRO

##### *Program Type Codes*

Program Type = 2, 3, 8, or 9

#### Programming Logic

To determine the Average Daily Bed Utilization Rate, divide total average number of people served by the sum of the total number of year round beds for households without children plus the total number of year round beds for households with children.

### Q10b: Point-in-Time Bed Utilization Rate

#### Business Rules

1. For question 10b, the point-in-time utilization rate is automatically calculated based on the total point-in-time count of persons served (Question 8c) divided by the total number of beds in the project (Question 5).

#### Programming Instructions

##### *Program Applicability*

## HUD Annual Performance Report (APR) Programming Specifications

1. SHP-TH
2. SHP-PH
3. SHP-SH
4. S+C
5. SRO

### **Program Type Codes**

Program Type = 2, 3, 8, or 9

### **Programming Logic**

To determine the bed utilization rate on the last Wednesday in ...

- A) *January* = Divide the number of persons served on the last Wednesday in January, *PointInTime1*, by the sum of the total number of year round beds for households without children from application plus the total number of year round beds for households with children from application. The year round beds can be pulled from Q5a.
- B) *April* = Divide the number of persons served on the last Wednesday in April, *PointInTime2*, by the sum of the total number of year round beds for households without children from application plus the total number of year round beds for households with children from application.
- C) *July* = Divide the number of persons served on the last Wednesday in July, *PointInTime3*, by the sum of the total number of year round beds for households without children from application plus the total number of year round beds for households with children from application.
- D) *October* = Divide the number of persons served on the last Wednesday in October *PointInTime4*, by the sum of the total number of year round beds for households without children from application plus the total number of year round beds for households with children from application.

## HUD Annual Performance Report (APR) Programming Specifications

### APR Q11: Unit Utilization Rate

NOTE: Programs will not need to enter any data for this question. Answers will be derived in *e-snaps* upon entering other data. However, HMIS vendors may choose to generate this question for validation purposes.

APR.xlsx, Sheet Name: Q10&11

**Unit Utilization Rate**  
Point-in-Time unit utilization rate

January	0%
April	0%
July	0%
October	0%

### Business Rules

- Question 11 is automatically calculated based on the total number of households on the last Wednesday of each month (Question 9b) divided by the total number of year-round units in the project (Question 5).

### Programming Instructions

#### **Program Applicability**

- SHP-TH
- SHP-PH
- SHP-SH
- SRO
- S+C Projects serving households with at least one adult and one child

#### **Program Type Codes**

Program Type = 2, 3, 8, or 9

### Programming Logic

To determine the unit utilization rate on the last Wednesday in ...

- January* = Divide the number of households served on the last Wednesday in January (Q9b) by the sum of the number of units for households without children from application (Q5a) plus the number of units for households with children from application (Q5a).
- April* = Divide the number of households served on the last Wednesday in April (Q9b) by the sum of the number of units for households without children from application (Q5a) plus the number of units for households with children from application (Q5a).
- July* = Divide the number of households served on the last Wednesday in July (Q9b) by the sum of the number of units for households without children from application (Q5a) plus the number of units for households with children from application (Q5a).

## HUD Annual Performance Report (APR) Programming Specifications

D) *October* = Divide the number of households served on the last Wednesday in October (Q9b) by the sum of the number of units for households without children from application (Q5a) plus the number of units for households with children from application (Q5a).

### APR Q12: Client Contacts and Engagements

APR.xlsx, Sheet Name: Q12

Q12a Total persons contacted through street outreach

**Number of Persons Contacted Rates During the Operating Year**

	Total	First contacted at place not meant for human habitation	First Contacted at non-housing service site	First contacted at Housing location	First contact place was missing
Once					
2-5 Times					
6-9 Times					
10+ Times					
Total					

Q12b Of those persons contacted by the street outreach program during the operating year, how many persons were engaged after...

**Number of Persons Engaged by Number of Contacts During the Operating Year**

	Total	First contacted at place not meant for human habitation	First Contacted at non-housing service site	First contacted at Housing location	First contact place was missing
1 Contact					
2-5 Contacts					
6-9 Contacts					
10+ Contacts					
Total					

Q12c Rate of Engagement

Rate of Engagement					
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### Business Rules

1. For both 12a and 12b, use each client's last program stay in the operating year.

## HUD Annual Performance Report (APR) Programming Specifications

2. There should be a maximum of one [date of engagement] (4.12) for each program stay. In the event that there is more than one date of engagement recorded for a single program stay, use the earliest.
3. The data universe for 12a is limited to program stays for which either there is no date of engagement or the date of engagement is on or after the first day of the operating year. All records of contacts associated with a client's last program stay with a [date of contact] (4.11) that is on or before the [date of engagement] (4.12), if there is one, and on or before the last day of the operating year, are part of the data universe, including contacts that may have occurred prior to the start of the operating year.
4. The data universe for 12b is a subset of 12a and is limited to program stays for which there is a date of engagement on or after the first day of the operating year and on or before the last day of the operating year. As in 12a, all records of contacts associated with the last program stay with a date of contact that is on or before the date of engagement, if there is one, and on or before the last day of the reporting period, are part of the data universe, including contacts that may have occurred prior to the start of the operating year.
5. Both 12a and 12b report counts of persons by [location of contact] (4.11) and number of contacts.
  - a. The location used for categorization purposes should be the location recorded on the first contact on the client's last program stay, which may have occurred prior to the start of the operating year.
  - b. In counting contacts, disregard any contact for which the [date of contact] (4.11) is after the date of engagement or after the last day of the operating year. For purposes of the APR, a contact that occurs after the date of engagement is irrelevant.
6. In 12a, the sum total (automatically calculated by *e-snaps*) represents an unduplicated count of persons with contacts (prior to engagement) during the operating year.
7. In 12b, the sum total (automatically calculated by *e-snaps*) represents an unduplicated count of persons engaged during the operating year.
8. In 12c, the rate of engagement is automatically calculated based on the total number of persons engaged (12b) divided by the total number of persons contacted (12a).
9. Programs are responsible for establishing a record in HMIS for each client contacted that includes sufficient identifying information to track subsequent contacts with the same client.
10. If there is no record of a contact on the date of engagement, count the engagement record itself as a contact. As there is no location of contact associated with the date of engagement, count this as a contact with a missing location of contact.
11. Limit the count of contacts to contacts since the last program exit date. If a client has no prior program stays, then count all contacts.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	HUD CSV REF	HUD CSV Table	HUD Data Standards Reference
ServiceEventType	4/D	ServiceEvent	NA

## HUD Annual Performance Report (APR) Programming Specifications

ContactSite	18/R	ServiceEvent	4.11B
ClientEngaged	19/S	ServiceEvent	4.12

### **Local Variables**

*NumberOfContacts* – For each client, count contacts associated with the last program stay of the operating year, but only if there is either no date of engagement, or the date of engagement is on or after the first day of the operating year (i.e. do not include clients whose last program stay includes a date of engagement prior to the start of the operating year). Count *only* contacts for which the date of contact is on or before either the date of engagement, if there is one, or the end of the reporting year, whichever comes first; this may include contacts which took place prior to the start of the operating year. If the client has a date of engagement within the operating year, and there are no prior contacts recorded, (NumberOfContacts = 0), count this client as having received 1 contact (NumberOfContacts = 1).

*ContactSite* – For each client with a NumberOfContacts that is greater than zero, set the ContactSite to the location recorded for the first contact associated with the client’s last program stay where the date of contact is on or before the date of engagement, even if this contact took place prior to the beginning of the operating year. The values for ContactSite are 1 (place not meant for human habitation), 2 (non-housing service site), or 3 (housing location). If the location of contact is blank (or the ‘first contact’ was the record of engagement), set ContactSite to 0.

### **Program Applicability**

1. SHP-SSO Outreach

### **Program Type Codes**

Program Type = 4

## HUD Annual Performance Report (APR) Programming Specifications

### Programming Logic

#### APR Q12a Total persons contacted through street outreach

1. Include all clients with a NumberOfContacts that is greater than zero and a date of engagement which is blank/null or on or after the first day of the operating year ([date of engagement] >= ReportStartDate), grouped by ContactSite and grouped by NumberOfContacts.

Once	NumberOfContacts = 1
2-5 Times	2 <= NumberOfContacts <= 5
6-9 Times	6 <= NumberOfContacts <= 9
10+ Times	Number of Contacts >= 10
Total	Calculated by <i>e-snaps</i>

#### APR Q12b Of those persons contacted by the street outreach program during the operating year, how many persons were engaged after...

1. Include all clients with a NumberOfContacts that is greater than zero and a date of engagement on or after the first day of the operating year ([date of engagement] >= ReportStartDate) and on or before the last day of the operating year ([date of engagement] <= ReportEndDate). Group the results by ContactSite and by NumberOfContacts as shown in the chart below.

Once	NumberOfContacts = 1
2-5 Times	2 <= NumberOfContacts <= 5
6-9 Times	6 <= NumberOfContacts <= 9
10+ Times	Number of Contacts >= 10
Total	Calculated by <i>e-snaps</i>

#### APR Q12c Rate of Engagement

## HUD Annual Performance Report (APR) Programming Specifications

NOTE: Programs will not need to enter any data for this question. Answers will be derived in *e-snaps* upon entering other data. However, HMIS vendors may choose to generate this question for validation purposes.

1. Determine the rate of engagement for each of the location columns by dividing the total number of persons engaged during the operating year (12b) by the total number of persons contacted during the operating year (12a).

### APR Q15: Gender

APR.xlsx, Sheet Name: Sec 3 Q15

#### Q15a1. Gender-Adults

**Gender of Adults  
Number of Adults in Households**

	Total	Without Children	With Children and Adults	Unknown Type
Male				
Female				
Transgendered				
Other				
Don't Know/Refused				
Information Missing				
Subtotal				

#### Q15a2. Gender - Children

**Gender of Children  
Number of Children in Households**

	Total	With Children and Adults	With Only Children	Unknown Type
Male				
Female				
Transgendered				
Other				
Don't Know/Refused				
Information Missing				
Subtotal				

#### Q15a3. Gender – Missing Age

**Gender – Persons Missing Age Information  
Number of Persons in Households**

	Total	Without Children	With Children and Adults	With only Children	Unknown Type
Male					
Female					

## HUD Annual Performance Report (APR) Programming Specifications

Transgendered					
Other					
Don't Know/Refused					
Information Missing					
Subtotal					

### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

### Program Type Codes

Program Type = 2, 3, 4, 5, 6, 8, or 9

### Q15a1: Gender of Adults

#### Business Rules

1. Report the gender characteristics of all persons served by the project during the operating year. Gender information on persons served must be reported in total and by household type.
2. When determining a person's adult/child status, use his/her age as of the most recent [program entry date] prior to the end of the operating year, or as of the start of the operating year, whichever is greater.
3. Question 15c should include all clients for whom age information is missing (i.e., not already included in 15a or 15b). If neither age nor gender information is available for a client, include the individual in under either "Don't know/refused" or "Missing this information," as applicable.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
Gender	Client	14/N	3.6

#### Global Variables

1. *AdultChild*
2. *HouseholdTypeClient*

## HUD Annual Performance Report (APR) Programming Specifications

### Programming Logic

Each column represents a different household type. Count the total number of adults (*AdultChild*= “Adult”) in each type, based on the derived adult/child status and *HouseholdTypeClient* global variables.

1. Each **row** is a different gender, represented by *Gender*. Determine the total number of records for each gender type as follows
  - A) *Male* = Count all applicable records where *Gender* equals 1.
  - B) *Female* = Count all applicable records where *Gender* equals 0.
  - C) *Transgendered* = Count all applicable records where *Gender* equals 2 or 3.
  - D) *Other* = Count all applicable records where *Gender* equals 4.
  - E) *Don’t Know / Refused* = Count all applicable records where *Gender* is equal to 8 or 9.
  - F) *Missing this information* = Count all applicable records where *Gender* is null.

### Q15a2: Gender of Children

Use the same logic described for Q15a, but filter for children only (*AdultChild*= “Child”).

### Q15a3: Gender of persons missing age information

Use the same logic described for Q15a, but filter for persons within an unknown adult/child status only (*AdultChild*= “Unknown”).

### APR Q16: Age

APR.xlsx, Sheet Name: Q16&1

	Age				
	Number of Persons in Household				
	Total	Without Children	With Children and Adults	With only children	Unknown Type
Under 5					
5 – 12					
13 – 17					
18 – 24					
25 – 34					
35 – 44					
45 – 54					
55 – 61					
62 +					
Don’t Know/Refused					
Information Missing					
Total					

## HUD Annual Performance Report (APR) Programming Specifications

### Business Rules

1. Report the age characteristics of all persons served by the project during the operating year. Age information on persons served must be reported in total and by household type.
2. When determining a person's adult/child status, use his/her age as of the most recent [program entry date] prior to the end of the operating year, or as of the start of the operating year, whichever is greater.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
DateOfBirth	Client	9/I	3.3A
DateOfBirthQualityCode	Client	10/J	3.3B

#### Global Variables

1. *AdultChild*
2. *AgeAtLastEntry*
3. *HouseholdTypeClient*

#### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

#### Program Type Codes

Program Type = 2, 3, 4, 5, 6, 8, or 9

#### Programming Logic

1. Each **column** represents a different household type. Count the total number of persons in each type, based on the *HouseholdTypeClient* global variable.
2. Each **row** represents an age range of a client at last enrollment represented by *AgeAtLastEntry*. Determine the total number of records for each age range as follows:
  - A) *Under 5 years* = Count all applicable records with age information (*AdultChild* does not equal "Unknown") that are less than 5 years old (*AgeAtLastEntry* is less than 5).

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- B) 5-12 = Count all applicable records between 5 and 12 years old (AgeAtLastEntry is greater than or equal to 5 and less than 13).
- C) 13-17 = Count all applicable records between 13 and 17 years old (AgeAtLastEntry is greater than or equal to 13 and less than 18).
- D) 18 – 24 = Count all applicable records between 18 and 24 years old (AgeAtLastEntry is greater than or equal to 18 and less than 25).
- E) 25 – 34 = Count all applicable records between 25 and 43 years old (AgeAtLastEntry is greater than or equal to 25 and less than 35).
- F) 35 – 44 = Count all applicable records between 35 and 44 years old (AgeAtLastEntry is greater than or equal to 35 and less than 45).
- G) 45 – 54 = Count all applicable records between 45 and 54 years old (AgeAtLastEntry is greater than or equal to 45 and less than 55).
- H) 55 – 61 = Count all applicable records between 55 and 61 years old (AgeAtLastEntry is greater than or equal to 55 and less than 62).
- I) 62 and over = Count all applicable records 62 years old and over (AgeAtLastEntry is greater than or equal to 62).
- J) *Don't Know / refused* = Count all applicable records where the client did not know or refused to give their Date of Birth (DateOfBirthQualityCode equals 8 or 9) and DateofBirth is not null.
- K) *Missing this information* = Count all applicable records where there is no age information (DateOfBirth is null) and DateOfBirthQualityCode does not equal 8 or 9.

### APR Q17: Ethnicity and Race

APR.xlsx, Sheet Name: Q16&17

#### Q17a. Ethnicity/Race - Ethnicity

Ethnicity					
Number of Persons in Households					
	Total	Without Children	With Children and Adults	With only Children	Unknown Type
Non-Hispanic/Non-Latino					
Hispanic/Latino					
Don't Know/Refused					
Information Missing					
Total					

#### Q17b. Ethnicity/Race - Race

Race					
Number of Persons in Households					
	Total	Without Children	With Children and Adults	With Only Children	Unknown Type
White					
Black or African- American					

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Asian					
American Indian or Alaska Native					
Native Hawaiian or Other Pacific Islander					
Multiple Races					
Don't Know/Refused					
Information Missing					
Total					

### Q17a: Ethnicity

#### Business Rules

1. Report the ethnicity and racial characteristics of all persons served by the project during the operating year. Ethnicity information on persons served must be reported in total and by household type.

#### Programming Instructions

##### Variables Used

##### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
Ethnicity	Client	13/M	3.5

##### Global Variables

1. *HouseholdTypeClient*

##### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

##### Program Type Codes

Program Type = 2, 3, 4, 5, 6, 8, or 9

##### Programming Logic

1. Each **column** represents a different household type. Count the total number of persons in each type, based on the *HouseholdTypeClient* variable, as derived in Section 8.

## HUD Annual Performance Report (APR) Programming Specifications

2. Each **row** represents a different ethnicity of a client, represented by “Ethnicity”. To determine the total number of records for each Ethnicity:
  - A) *Non-Hispanic/Non-Latino*=All applicable records where Ethnicity equals 0.
  - B) *Hispanic/Latino* = All applicable records where Ethnicity equals 1.
  - C) *Don’t Know/ Refused* = All applicable records where Ethnicity equals 8 or 9.
  - D) *Missing this information* = All applicable records where Ethnicity is null.

### Q17b: Race

#### Business Rules

1. Report the racial characteristics of all persons served by the project during the operating year. Race information on persons served must be reported in total and by household type.
2. Persons counted under “multiple races” should not also be counted in other race categories. “Multiple races” refers to persons who in HMIS are identified as two or more racial categories.

#### Programming Instructions

##### Variables Used

##### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
PrimaryRace	Client	11/K	3.4
SecondaryRace	Client	12/L	3.4

##### Global Variables

1. *HouseholdTypeClient*

##### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

##### Program Type Codes

Program Type = 2, 3, 4, 5, 6, 8, or 9

## HUD Annual Performance Report (APR) Programming Specifications

### Programming Logic

1. Each **column** represents a different household type. Count the total number of persons in each type, based on the *HouseholdTypeClient* global variable.
2. Each **row** represents a different race. While an HMIS should allow a client to indicate all applicable races, collection of two race fields is all that is needed to complete the APR<sup>2</sup>.

Determine the total records for each race as follows:

- A) *White* = Count all clients where a race field equals 5 and all other race fields are blank.
- B) *Black or African-American* = Count all clients where a race field equals 3 and all other race fields are blank.
- C) *Asian* = Count all clients where a race field equals 2 and all other race fields are blank.
- D) *American Indian or Alaska Native* = Count all clients where a race field equals 1 and all other race fields are blank.
- E) *Native Hawaiian or Other Pacific Islander* = Count all clients where a race field equals 4 and all other race fields are blank.
- F) *Multiple Races* = Count all clients where more than one race field is greater than 0 and less than 8.
- G) *Don't Know / Refused* = Count all clients where at least one race field is between 8 and 9, and no race field is between 1 and 5.
- H) *Information Missing* = Count all records where all race fields are blank.

### APR Q18: Physical and Mental Health Condition at Entry

APR.xlsx, Sheet Name: Q18

#### Q18a. Physical and Mental Health Types of Conditions

##### Known Physical and Mental Health Conditions Number of Persons in Households

	Total Persons	Without Children	With Children and Adults	With Only Children	Unknown Type
Mental Illness					
Alcohol Abuse					
Drug Abuse					
Chronic Health Condition					
HIV/AIDS and Related Diseases					
Developmental Disability					
Physical Disability					

<sup>2</sup> In the HMIS CSV format, race is represented by PrimaryRace and SecondaryRace, due to the limitations of that format.

## HUD Annual Performance Report (APR) Programming Specifications

### Q18b. Physical and Mental Health Known Conditions at Entry

#### Number of Known Conditions

#### Number of Persons

	Total Persons	Households without Children	Households with Children and Adults	Households with only Children	Unknown Households
None					
1 Condition					
2 Conditions					
3+ Conditions					
Condition Unknown					
Don't Know/Refused					
Information Missing					
Total					

### Q18a: Known Physical and mental health conditions

#### Business Rules

1. Report the physical and mental health conditions of all persons served by the project during the operating year. Physical and mental health condition information on persons served must be reported separately for all persons by household type.
2. For purposes of the APR, each client's reported physical and mental health condition is based on information collected at the last program entry prior to the end of the operating year.

#### Programming Instructions

#### *Variables Used*

#### *Fields Referenced from the HUD HMIS Data Standards*

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
ChronicHealth	ClientHistorical	14/N	4.5A
DevDisability	ClientHistorical	12/L	4.4A
HIV_AIDS	ClientHistorical	16/P	4.6A
MentalHealth	ClientHistorical	18/R	4.7A
PhysDisability	ClientHistorical	10/J	4.3A
SubstanceAbuse	ClientHistorical	21/U	4.8A

# HUD Annual Performance Report (APR) Programming Specifications

## Global Variables

1. *HouseholdTypeClient*
2. *EntryExit*

## Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO

## Program Type Codes

Program Type = 2, 3, 4, 6, 8, or 9

## Programming Logic

1. Each **column** represents a different household type. Count the total number of persons in each type, based on the *HouseholdTypeClient* global variable.
2. Each **row** represents a different disabling condition. Determine the total clients with each condition, based on data collected at program entry for each client's last program stay in the operating year.
  - A) *Mental Illness* = Count all applicable program entry records (*EntryExit*= "Entry")with recorded mental illness (*MentalHealth* = 1).
  - B) *Alcohol Abuse* = Count all applicable program entry records (*EntryExit* = "Entry")with either a recorded alcohol problem or both an alcohol and drug problem (*SubstanceAbuse* = 1 or 3).
  - C) *Drug Abuse* = Count all applicable program entry records (*EntryExit* = "Entry")with either a recorded drug problem or both an alcohol and drug problem (*SubstanceAbuse* = 2 or 3).
  - D) *Chronic Health condition* = Count all applicable program entry records (*EntryExit* = "Entry") with a recorded chronic health condition (*ChronicHealth* = 1).
  - E) *HIV / AIDS and related diseases* = Count all applicable program entry records (*EntryExit* = "Entry") with recorded HIV / AIDS (*HIV\_AIDS* = 1).
  - F) *Developmental Disability* = Count all applicable program entry records (*EntryExit* = "Entry") with a recorded developmental disability (*DevDisability* = 1).
  - G) *Physical Disability* = Count all applicable program entry records (*EntryExit* = "Entry") with a recorded physical disability (*PhysDisability* = 1).

## HUD Annual Performance Report (APR) Programming Specifications

### Q18b: Number of known conditions

#### Business Rules

1. Answers to Question 18b should be based on both a general question about whether a client has any disability as well as questions related to specific disabilities.
  - a. First check all of the questions related to specific conditions. If the client is listed as having any specific condition, base the answer to this question entirely on positive answers to the questions related to specific conditions.
  - b. If no specific conditions are recorded for the client, use the data recorded for the [disabling condition] (3.8) universal data element to determine whether to count the client as having no conditions, a disability but an unknown specific condition, don't know, refused, or missing.

For purposes of the APR, each client's reported physical and mental health condition is based on information collected at the last program entry prior to the end of the operating year

#### Programming Instructions

##### *Variables Used*

##### *Fields Referenced from the HUD HMIS Data Standards*

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
DisablingCondition	ProgramParticipation	9/I	3.8
ChronicHealth	ClientHistorical	14/N	4.5A
DevDisability	ClientHistorical	12/L	4.4A
HIV_AIDS	ClientHistorical	16/P	4.6A
MentalHealth	ClientHistorical	18/R	4.7A
PhysDisability	ClientHistorical	10/J	4.3A
SubstanceAbuse	ClientHistorical	21/U	4.8A

#### *Global Variables*

1. *HouseholdTypeClient*
2. *EntryExit*
3. *NumberOfConditions*

#### *Program Applicability*

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH

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- 7. S+C
- 8. SRO

### Program Type Codes

Program Type = 2, 3, 4, 6, 8, or 9

### Programming Logic

1. Each **column** represents a different household type. Count the total number of persons in each type, based on the *HouseholdTypeClient* global variable.
2. Each **row** represents a total number of conditions a client has, represented by the global variable *NumberOfConditions* and the universal data element [disabling condition] (3.8).
3. Determine the total number of records for each number of conditions as follows, based on data collected at program entry date for each client’s last program stay in the operating year.
  - a) *No known conditions* = Count all applicable program entry records (*EntryExit* = “Entry”) with 0 conditions (*NumberOfConditions* = 0) and the [Disabling Condition] universal data element indicates that the client has no disabling conditions. (*DisablingCondition* = 0).
  - b) *1 known condition* = Count all applicable program entry records (*EntryExit* = “Entry”) with 1 condition (*NumberOfConditions* = 1).
  - c) *2 known conditions* = Count all applicable program entry records (*EntryExit* = “Entry”) with 2 conditions (*NumberOfConditions* = 2).
  - d) *3 or more known conditions* = Count all applicable program entry records (*EntryExit* = “Entry”) with at least 3 conditions (*NumberOfConditions* is equal to or greater than 3).
  - e) *Disabled – condition unknown* = Count all applicable program entry records (*EntryExit* = “Entry”) states that the client has 0 conditions (*NumberOfConditions* = 0), but the [Disabling Condition] universal data element indicates that the client does have a disabling condition (*DisablingCondition* = 1).
  - f) *Don’t Know / Refused* = Count all applicable program entry records (*EntryExit* = “Entry”) with 0 conditions and the [Disabling Condition] universal data element is “Don’t Know” or “Refused” (*DisablingCondition* = 8 or *DisablingCondition* = 9).
  - g) *Missing this information* = Count all applicable program entry records (*EntryExit* = “Entry”) with 0 conditions (*NumberOfConditions* = 0), and the [Disabling Condition] universal data element is null (*DisablingCondition* is null).

### APR Q19: Victims of Domestic Violence

APR.xlsx, Sheet Name: Q19

#### 19a. Past Domestic Violence Experience Number of Adults and Unaccompanied Children in Households

	Total	Without Children	With Children and Adults	With Only Children	Unknown Type
Yes					
No					
Don’t Know/Refused					
Information Missing					
Total					

## HUD Annual Performance Report (APR) Programming Specifications

### 19b. When Past Domestic Violence Experience Occurred Number of Adults and Unaccompanied Children in Households

	Total	Without children	With Children and Adults	With only Children	Unknown Type
Within the past 3 months					
3 to 6 Months Ago					
6 to 12 Months Ago					
More than a Year Ago					
Don't Know/Refused					
Information Missing					

### Q19a: Past Domestic Violence Experience

#### Business Rules

1. Report the domestic violence experience of all adults and unaccompanied children served by the project during the operating year. Domestic violence information on adults and unaccompanied children served must be reported in total and by household type.
2. The total number of persons recorded in 'yes' to a past domestic violence experience should equal the total number of persons recorded in 'when past domestic violence experience occurred.'

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
DomesticViolence	ClientHistorical	24/X	4.9A

#### Global Variables

1. *AdultChild*
2. *AdultOrUnChild*
3. *HouseholdTypeClient*
4. *EntryExit*

#### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal

## **HUD Annual Performance Report (APR) Programming Specifications**

5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO

### ***Program Type Codes***

Program Type = 2, 3, 4, 6, 8, or 9

### **Programming Logic**

1. Report on only adults or unaccompanied children (*AdultOrUnChild* = "Y"). Use data collected at program entry (*EntryExit* is "Entry") for the last program stay in the operating year (*LastEpisode* is "Y").
2. Each **column** represents a different household type. Count the total number of persons in each type, based on the *HouseholdTypeClient* global variable.
3. Each row represents a whether or not a record has a past experience with Domestic Violence. Determine each DomesticViolence status as follows:
  - A) *Yes* = Count all applicable records where the assessment shows a Yes for DomesticViolence (*DomesticViolence* = 1).
  - B) *No* = Count all applicable records where the assessment shows a No for DomesticViolence (*DomesticViolence* = 1).
  - C) *Don't Know / Refused* = Count all applicable records where the assessment shows a Don't Know or Refused for Domestic Violence (*DomesticViolence* = 8 or 9).
  - D) *Missing this information* = Count all applicable records where the assessment shows nothing for Domestic Violence (DV is blank).

### **19b: When Experience Occurred**

#### **Business Rules**

1. For all adults and unaccompanied children reporting domestic violence experience, record the length of time that has passed since the domestic violence incident occurred.
2. The total number of persons recorded in 'yes' to a domestic violence experience should equal the total number of persons recorded in 'when past domestic violence experience occurred.'

## HUD Annual Performance Report (APR) Programming Specifications

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
DomesticViolence	ClientHistorical	24/X	4.9B
DVOccurred	ClientHistorical	25/Y	4.9B

#### Global Variables

1. *AdultChild*
2. *AdultOrUnChild*
3. *HouseholdTypeClient*
4. *EntryExit*

#### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO

#### Program Type Codes

Program Type = 2, 3, 4, 6, 8, or 9

#### Programming Logic

1. Report on only adults or unaccompanied children (*AdultOrUnChild* = "Y"). Use data collected at program entry (*EntryExit* is "Entry") for the *LastEpisode* (*LastEpisode*="Y") where *DomesticViolence* is "Yes" (*DomesticViolence* = 1).
2. Each **column** represents a different household type. Count the total number of persons in each type, based on the *HouseholdTypeClient* global variable.
3. Each **row** represents a time frame as to when the last occurrence of Domestic Violence took place, represented by *DVOccurred* for each client where it is indicated that they are a victim of Domestic Violence (*DomesticViolence* = 1). Determine the total number of records for each time frame as follows:
  - A. *Within the past three months* = Count all applicable records where domestic violence occurred within the past three months (*DVOccurred* = 1).
  - B. *Three to six months ago* = Count all applicable records where domestic violence occurred in the past three to six months (*DVOccurred* = 2).
  - C. *From six to twelve months ago* = Count all applicable records where domestic violence occurred in the past six to twelve months (*DVOccurred* = 3).

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- D. *More than a year ago* = Count all applicable records where domestic violence occurred over a year ago (DVOccurred = 4).
- E. *Don't Know / Refused* = Count all applicable records where the client did not know or refused to answer when the domestic violence occurred (DVOccurred = 8 or 9).
- F. *Missing this information* = Count all applicable records where when domestic violence occurred is blank (DVOccurred is blank).

### APR Q20: Residence Prior to Program Entry

APR.xlsx, Sheet Name: Q20

#### Q20a1. Residence Prior to Program Entry – Homeless Situations

**Residence Prior to Program Entry – Homeless Situations  
Number of Persons in Households**

	Total	Without Children	With Children and Adults	With Only Children	Unknown Type
Emergency Shelter					
Transitional Housing for Homeless Persons					
Place Not Meant For Human Habitation					
Safe Haven					
Subtotal					

#### Q20a2. Residence Prior to Program Entry – Institutional Settings

**Residence Prior to Program Entry – Institutional Settings  
Number of Persons in Households**

	Total	Without Children	With Children and Adults	With Only Children	Unknown Type
Psychiatric Facility					
Substance Abuse or Detox Center					
Hospital (Non-Psychiatric)					
Jail, prison, or juvenile detention					
Foster Care					
Subtotal					

#### Q20a3. Residence Prior to Program Entry – Other Locations

**Residence Prior to Program Entry – Other Locations  
Number of Persons in Households**

	Total	Without Children	With Children and Adults	With Only Children	Unknown Type
PSH for Homeless persons					
Owned by Client, no Subsidy					
Owned by Client, with Subsidy					
Rental by Client, no Subsidy					

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Rental by Client, with VASH Subsidy					
Rental by Client with Other Subsidy					
Hotel/Motel, Paid by Client					
Staying or Living with Family					
Staying or Living with Friend(s)					
Other					
Don't Know/Refused					
Information Missing					
Subtotal					
Total					

### Business Rules

1. Report the residence prior to program entry for adults and unaccompanied children served by the project during the operating year. Residence prior to program entry information on persons served must be reported in total and by household type.
2. Use prior residence data from each person's last program stay in the operating year.
3. The sub-totals and totals are calculated automatically in e-snaps.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
PriorResidence	ProgramParticipation	10/J	3.9A

#### Global Variables

1. *HouseholdTypeClient*
2. *LastEpisode*
3. *AdultOrUnChild*

#### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO

#### Program Type Codes

Program Type = 2, 3, 4, 5, 6, 8, or 9

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### Programming Logic

1. Report on only adults or unaccompanied children (*AdultOrUnChild* is equal to “Y”).
2. Each **column** represents a different household type. Count the total number of persons in each type, based on the *HouseholdTypeClient* global variable.
3. Each row represents a different homeless situation, represented by *PriorResidence*. Determine the total number of records based on the last program stay (*LastEpisode* = “Y”) for each row as follows:
  - A. *Emergency Shelter* = Count all applicable records where the *PriorResidence* is equal to 1 on the last program stay (*LastEpisode*= “Y”).
  - B. *Transitional housing for homeless persons* = Count all applicable records where the *PriorResidence* is equal to 2.
  - C. *Place not meant for habitation* = Count all applicable records where the *PriorResidence* is equal to 16.
  - D. *SafeHaven* = Count all applicable records where the *PriorResidence* is equal to 18.
  - E. *Psychiatric hospital or other psychiatric facility* = Count all applicable records where the *PriorResidence* is equal to 4.
  - F. *Substance abuse treatment facility or detox center* = Count all applicable records where the *PriorResidence* is equal to 5.
  - G. *Hospital (Non-psychiatric)* = Count all applicable records where the *PriorResidence* is equal to 6.
  - H. *Jail, prison, or juvenile detention facility* = Count all applicable records where the *PriorResidence* is equal to 7.
  - I. *Permanent housing for formerly homeless persons* = Count all applicable records where the *PriorResidence* is equal to 3.
  - J. *Owned by client, no ongoing housing subsidy* = Count all applicable records where the *PriorResidence* is equal to 23.
  - K. *Owned by client with ongoing housing subsidy* = Count all applicable records where the *PriorResidence* is equal to 21.
  - L. *Rental by client, no ongoing housing subsidy* = Count all applicable records where the *PriorResidence* is equal to 22.
  - M. *Rental by client with VASH housing subsidy* = Count all applicable records where the *PriorResidence* is equal to 19.
  - N. *Rental by client with other (non-VASH) ongoing housing subsidy* = Count all applicable records where the *PriorResidence* is equal to 20.
  - O. *Hotel or motel paid for without emergency shelter voucher* = Count all applicable records where the *PriorResidence* is equal to 14.
  - P. *Staying or living in a family member’s room, apartment, or house* = Count all applicable records where the *PriorResidence* is equal to 12.
  - Q. *Staying or living in a friend’s room, apartment, or house* = Count all applicable records where the *PriorResidence* is equal to 13.
  - R. *Foster care home or foster care group home* = Count all applicable records where the *PriorResidence* is equal to 15.

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- S. *Other* = Count all applicable records where the PriorResidence is equal to 17.
- T. *Don't know / Refused* = Count all applicable records where the PriorResidence is equal to 8 or 9.
- U. *Missing this information* = Count all applicable records where the PriorResidence is blank.

### APR Q21: Veteran Status

APR.xlsx, Sheet Name: Q21

**Veteran Status  
Number of Adults in Household**

	Total	Without Children	With Children and Adults	Unknown Type
Veteran				
Not a Veteran				
Don't Know/Refused				
Information missing				
Total				

### Business Rules

1. Report the veteran status for all adults served by the project during the operating year. Veteran status information on adults served must be reported in total and by household type.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
Veteran	ProgramParticipation	8/H	3.7

### Global Variables

1. *AdultChild*
2. *HouseholdTypeClient*

### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO

## HUD Annual Performance Report (APR) Programming Specifications

9. HPRP

### **Program Type Codes**

Program Type = 2, 3, 4, 5, 6, 8, or 9

### **Programming Logic**

1. Report on only adults (*AdultChild*= “Adult”).
2. Each **column** represents a different household type. Count the total number of persons in each type, based on the *HouseholdTypeClient* global variable. Note that “households with only children” is not an option on this question, since the question is restricted to adults only.
3. Each **row** is a different veteran status, represented by *VeteranStatus*. Determine the total number of records for each veteran status as follows:
  - A) *A veteran* = All applicable records that are veterans (*VeteranStatus*= 1).
  - B) *Not a veteran* = All applicable records that are not a veteran (*VeteranStatus*= 0).
  - C) *Don’t Know / Refused* = All applicable records where the client did not know or refused to give their veteran status (*VeteranStatus*= 8 or 9).
  - D) *Missing this information* = All applicable records that have no veteran status (*VeteranStatus* is blank).

### **HUD CSV Files Referenced**

1. Client.csv
2. ProgramParticipation.csv

### **APR Q22a: Physical and Mental Health Condition at Exit by Exit Status – Leavers**

APR.xlsx, Sheet Name: Q22a

#### **Q22a1. Physical and Mental Health Condition Types at Exit – Leavers**

**Known Physical and Mental Health Conditions  
Leavers – Total Number by Type**

	All Persons	Adults	Children	Age Unknown
Mental Illness				
Alcohol Abuse				
Drug Abuse				
Chronic Health Condition				
HIV/AIDS and Related Diseases				
Developmental Disability				
Physical Disability				

#### **Q22a2. Known Physical and Mental Health Condition at Exit – Leavers**

**Number of Known Conditions  
Leavers – Total Number by Type**

	All Persons	Adults	Children	Age Unknown

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None				
1 Condition				
2 Conditions				
3+ Conditions				
Condition Unknown				
Don't Know/Refused				
Information Missing				
Total				

### Q22a1: Physical and Mental Health Conditions Types at Exit - Leavers

#### Business Rules

1. Report the physical and mental health conditions of all persons served by the project during the operating year. Physical and mental health condition information on persons served must be reported in total, by exit status, and by age group (adult, child, unknown).

For purposes of the APR, each client's reported physical and mental health condition by exit status is based on information collected at exit (for leavers) or at the most recent update (for stayers), which may have been at program entry for clients who have not been in the program long enough to have follow-up data.

#### Programming Instructions

##### Variables Used

##### Fields Referenced from the HUD HMIS Data Standards

Table	Primary Field Name	HUD CSV REF	HUD Data Standards Reference
ClientHistorical	ChronicHealth	14/N	4.5A
ClientHistorical	DevDisability	12/L	4.4A
ClientHistorical	HIV_AIDS	16/P	4.6A
ClientHistorical	MentalHealth	18/R	4.7A
ClientHistorical	PhysDisability	10/J	4.3A
ClientHistorical	SubstanceAbuse	21/U	4.8A

##### Global Variables

1. *AdultChild*
2. *MostRecentAssessment*
3. *LeaverOrStayer*

##### Program Applicability

1. SHP-TH
2. SHP-PH

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3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO

### **Program Type Codes**

Program Type = 2, 3, 4, 6, 8, or 9

### **Programming Logic**

1. Each column is a different age group (All, Adult, Child, Unknown), represented by *AdultChild*. Determine the total applicable records for each age group as follows:
  - A) *All persons* = All records where the client was a "leaver" during the reporting period (*LeaverOrStayer* equals "L") regardless of age.
  - B) *Adults* = All records where the client was a "leaver" during the reporting period (*LeaverOrStayer*= "L") and is an adult (*AdultChild*= "Adult").
  - C) *Children* = All records where the client was a "leaver" during the reporting period (*LeaverOrStayer*= "L") and is a child (*AdultChild*= "Child").
  - D) *Unknown* = All records where the client was a "leaver" during the reporting period (*LeaverOrStayer*= "L") and has an unknown age (*AdultChild* equals "Unknown").
2. Each row represents a different mental or physical health condition. Determine the total records for each condition as follows:
  - A) *Mental illness* = All applicable records where the client had a mental health problem (*MentalHealth* = 1) as of the most recent assessment (*MostRecentAssessment*= "Y").
  - B) *Alcohol Abuse* = All applicable records where the client had either an alcohol or both an alcohol and drug substance abuse problem (*SubstanceAbuse* = 1 or 3) as of the most recent assessment (*MostRecentAssessment*= "Y").
  - C) *Drug Abuse* = All applicable records where the client had either a drug or both alcohol and drug substance abuse problem (*SubstanceAbuse* = 2 or 3) as of the most recent assessment (*MostRecentAssessment*= "Y").
  - D) *Chronic Health Condition* = All applicable records where the client had a chronic health condition (*ChronicHealth* = 1) as of the most recent assessment (*MostRecentAssessment*= "Y").
  - E) *HIV / AIDS and related diseases*= All applicable records where the client had HIV/AIDS or related disease (*HIV\_AIDS* = 1) as of the most recent assessment (*MostRecentAssessment* equals "Y").
  - F) *Developmental Disability* = All applicable records where the client had a developmental disability (*DevDisability* = 1) as of the most recent assessment (*MostRecentAssessment*= "Y").
  - G) *Physical Disability* = All applicable records where the client had a physical disability (*PhysDisability* = 1) as of the most recent assessment (*MostRecentAssessment*= "Y").

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## **HUD CSV Files Referenced**

1. ClientHistorical.csv
2. ProgramParticipation.csv

## **Q22a2: Number of known conditions - Leavers**

### **Business Rules**

1. Answers to Question 22a2 should be based on both a general question about whether a client has any disability as well as questions related to specific disabilities.
  - a. First check all of the questions related to specific conditions. If the client is listed as having any specific condition, base the answer to this question entirely on positive answers to the questions related to specific conditions.
  - b. If no specific conditions are recorded for the client, use the data recorded for the [disabling condition] (3.8) universal data element to determine whether to count the client as having no conditions, a disability but an unknown specific condition, don't know, refused, or missing.

## **Programming Instructions**

### **Variables Used**

#### **Global Variables**

1. *AdultChild*
2. *NumberOfConditions*
3. *MostRecentAssessment*
4. *LeaverOrStayer*

#### **Program Applicability**

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO

#### **Program Type Codes**

Program Type = 2, 3, 4, 6, 8, or 9

## HUD Annual Performance Report (APR) Programming Specifications

### Programming Logic

1. Each column is a different age group (All, Adult, Child, Unknown), represented by *AdultChild*. Determine the total applicable records for each age group as follows:
  - a. *All persons* = All records where the client was a "leaver" during the reporting period (*LeaverOrStayer*= "L") regardless of age.
  - b. *Adults* = All records where the client was a "leaver" during the reporting period (*LeaverOrStayer*= "L") and is an adult (*AdultChild*= "Adult").
  - c. *Children* = All records where the client was a "leaver" during the reporting period (*LeaverOrStayer*= "L") and is a child (*AdultChild*= "Child").
  - d. *Unknown* = All records where the client was a "leaver" during the reporting period (*LeaverOrStayer*= "L") and has an unknown age (*AdultChild*= "Unknown").
2. Determine the total number of records for each number of conditions as follows:
  - a. *No known conditions* = Count all applicable records where most recent assessment (*MostRecentAssessment* = "Y") states that they have 0 conditions. (*NumberOfConditions* = 0) and the [Disabling Condition] universal data element indicates that the client has no disabling conditions. (*DisablingCondition* = 0).
  - b. *1 known condition* = Count all applicable records where most recent assessment (*MostRecentAssessment*= "Y").states that they have 1 condition (*NumberOfConditions* = 1).
  - c. *2 known conditions* = Count all applicable records where the most recent assessment (*MostRecentAssessment*= "Y") states that they have 2 conditions (*NumberOfConditions* = 2).
  - d. *3 or more known conditions* = Count all applicable records where most recent assessment (*MostRecentAssessment*= "Y") states that they have at least 3 conditions (*NumberOfConditions* is equal to or greater than 3).
  - e. *Condition Unknown* = Count all applicable records where the most recent assessment (*MostRecentAssessment*= "Y") states that the client has 0 conditions (*NumberOfConditions* equals 0), but the [Disabling Condition] universal data element indicates that the client does have a disabling condition (*DisablingCondition* = 1).
  - f. *Don't Know / Refused* = Count all applicable records where the most recent assessment (*MostRecentAssessment*= "Y") that the client has 0 conditions (*NumberOfConditions* = 0), and the [Disabling Condition] universal data element indicates that the client does not know or refused to answer whether he or she has a disabling condition (*DisablingCondition* = 8 or 9).
  - g. *Missing this information* = Count all applicable records where most recent assessment (*MostRecentAssessment*= "Y") states that the client has 0 conditions (*NumberOfConditions* = 0), and the [Disabling Condition] universal data element indicates is null (*DisablingCondition* is null).

### HUD CSV Files Referenced

1. ClientHistorical.csv
2. ProgramParticipation.csv

**HUD Annual Performance Report (APR)  
Programming Specifications**

**APR Q22b: Physical and Mental Health Condition at Exit by Exit Status - Stayers**

APR.xlsx, Sheet Name: Q22b

**Q22b1. Physical and Mental Health Condition Types at Exit – Stayers**

**Known Physical and Mental Health Conditions**

**Stayers – Total Number by Type**

	<b>All Persons</b>	<b>Adults</b>	<b>Children</b>	<b>Age Unknown</b>
Mental Illness				
Alcohol Abuse				
Drug Abuse				
Chronic Health Condition				
HIV/AIDS and Related Diseases				
Developmental Disability				
Physical Disability				

**Q22b2. Known Physical and Mental Health Condition at Exit – Stayers**

**Number of Known Conditions**

**Stayers – Total Number by Type**

	<b>All Persons</b>	<b>Adults</b>	<b>Children</b>	<b>Age Unknown</b>
None				
1 Condition				
2 Conditions				
3+ Conditions				
Condition Unknown				
Don't Know/Refused				
Information Missing				
<b>Total</b>				

Use all the same business rules and programming logic as described for Q22a, but select clients who are stayers instead of leavers (*LeaverOrStayer*= "S").

## HUD Annual Performance Report (APR) Programming Specifications

### APR Q23: Client Monthly Cash-Income Amount by Entry and Exit Status

APR.xlsx, Sheet Name: Q23&Q24

#### Q23. Client Monthly Cash-Income Amount - Adult Leavers

##### Client Monthly Cash – Income Amount Number of Adult Leavers

Program Entry	Income at Entry	Income at Exit	Less Income at Exit	Same Income at Exit	More Income at Exit	Unknown Income Change	Average Change (\$) Monthly Income per Adult
No Income							
\$1 - \$150							
\$151 - \$250							
\$251 - \$500							
\$501 - \$750							
\$751 - \$1,000							
\$1,001 - \$1,250							
\$1,251 - \$1,500							
\$1,501 - \$1,750							
\$1,751 - \$2,000							
\$2,001 +							
Don't Know/Refused							
Information Missing							
Total							

### Business Rules

1. Report total cash income amounts at entry and exit only for all adults served by the program during the operating year who exited and were not in the program on the last day of the operating year (leavers).
2. Report using data from each client's last program stay during the operating year.
3. Question 23 should be based on whether the client had any financial resources, income sources reported, as well as actual income amounts reported:
  - If an amount greater than \$0 for total income has been recorded for a client and amounts for specific income sources have also been recorded, use the single total income amount as entered by the user for this question rather than the sum of the amounts entered for specific income sources. However, if no total amount is recorded and data are available for specific sources, use the sum of the amounts recorded for each specific income source.
  - Clients should be reported in the "No income" category only when clients specifically reported that they had no income ([Income received from any source in past 30 days?] (4.1) = 'No'), total income amount is \$0.00 or blank, and no amounts have been recorded for specific income sources.

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- Report data as “Don’t know/Refused” if [Income received from any source in past 30days?] is “Don’t Know” or “Refused”, the total monthly income is blank, and there are no amounts recorded for any of the specific income sources.
4. The same assessment should not be used for both entry and exit amounts. If, for example, the program only collected income amounts at entry, then client should be counted in the “Information Missing” cell.
  5. Per HUD’s HMIS Data & Technical Standards, sources of cash income include: earned income (e.g., employment income), Unemployment Insurance, Supplemental Security Income (SSI), Supplemental Security Disability Income (SSDI), a veteran’s disability payment, private disability insurance, Worker’s Compensation, Temporary Assistance for Needy Families (TANF) or local equivalent, General Assistance (GA) or local equivalent, retirement income from Social Security, veteran’s pension, pension from a former job, child support, alimony or other spousal support, and other sources. Cash income does not include Food Stamps. Financial Assistance provided by HPRP programs is not factored into income amounts.
  6. After recording a person’s income at entry and exit, indicate if that person received less/the same/more/or unknown income at exit. This should be recorded in same row as that person’s income-at-entry row.
  7. Report the average change in monthly income per adult, categorized by income-at-entry. For example, if exactly one adult had no income at entry and that same client had \$500 at exit, the average change per adult for the first row (those who had no income) would simply be \$500.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
IncomeLast30	ClientHistorical	8/H	4.1A
SourceCode	IncomeBenefits	8/H	4.1B
IncomeTotalMonthly	ClientHistorical	7/G	4.1C

#### Global Variables

1. *AdultChild*
2. *LastEpisode*
3. *LeaverOrStayer*

#### Local Variables

*IncomeAtEntry* - This variable will be used for both leavers (in Q23) and stayers (in Q24), and represents income at the time of program entry (*EntryExit* = “Entry”) on the last program stay (*LastEpisode* = “Y”) of the reporting period. In most cases, it will be equal to the [Total Monthly

## HUD Annual Performance Report (APR) Programming Specifications

Income] as entered by the user, but given the variety of possible combinations of data in the Income and Sources data element, it will be necessary to apply the following rules, in order, until an *IncomeAtEntry* has been determined for each adult:

Rule #	Total Monthly Income	Income Last 30 Days	Individual sources specified?	Individual source amounts entered?	Effective Income
1	> \$0.00	(any)	(any)	(any)	Total Monthly Income as entered
2	(any)	(any)	Yes	Yes**	Sum amounts for individual sources to get total monthly income
2.5	(any)	No	(any)	(any)	\$0.00
3	\$0.00	Yes or NULL	(any)	(any)	\$0.00
4	(any)	Don't Know or Refused	(any)	(any)	Unknown
5	(any)	(any)	(any)	(any)	NULL

*IncomeAtExit* - This variable represents income at the time of program exit (*EntryExit* = "Exit") on the last program stay (*LastEpisode* = "Y") of the reporting period for leavers (*LeaverOrStayer* = 'L'). In most cases, it will be equal to the [Total Monthly Income] as entered by the user, but given the variety of possible combinations of data in the Income and Sources data element, it will be necessary to apply the following rules, in order, until an *IncomeAtExit* has been determined for each adult leaver:

Rule #	Total Monthly Income	Income Last 30 Days	Individual sources specified?	Individual source amounts entered?	Effective Income
1	> \$0.00	(any)	(any)	(any)	Total Monthly Income as entered
2	(any)	(any)	Yes	Yes**	Sum amounts for individual sources to get total monthly income
2.5	(any)	No	(any)	(any)	\$0.00
3	\$0.00	Yes or NULL	(any)	(any)	\$0.00
4	(any)	Don't Know or Refused	(any)	(any)	Unknown
5	(any)	(any)	(any)	(any)	NULL

**\*\* Note that any individual income amounts that lack a corresponding indication of the type of income source that was received will be treated as if the client were missing this income altogether.**

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*IncomeChangeAmount* – Subtract *IncomeAtEntry* from *IncomeAtExit* to populate the *IncomeChangeAmount* field. If either *IncomeAtEntry* or *IncomeAtExit* are NULL or ‘Unknown’, set *IncomeChangeAmount* to NULL. (Note that there is also a variable of this name defined for Q24; in Q24, the value is based on *IncomeAtEntry* and *IncomeMostRecent* rather than *IncomeAtEntry* and *IncomeAtExit*.)

*IncomeChange* - Used to determine whether or not the income level increased, decreased or remained the same for the client during their stay, and is based on *IncomeChangeAmount*.

<i>IncomeChangeAmount</i>	<i>IncomeChange</i>
> 0	gt
< 0	lt
= 0	eq
NULL	un

### **Program Applicability**

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

### **Program Type Codes**

Program Type = 2, 3, 4, 5, 6, 8, or 9

### **Programming Logic**

1. Report on adults leavers only (*AdultChild* equals “Adult and *LeaverOrStayer* equals “L”).
2. Each column should be calculated as follows:
  - A) *Number of Adults at Entry* = Count all records where *IncomeAtEntry* is within the row criteria range.
  - B) *Number of Adults at Exit* = Count all records where *IncomeAtExit* is equal to the row criteria range, **regardless of the client’s *IncomeAtEntry***. (Note: All other columns in this question are based on clients whose *IncomeAtEntry* is within the row criteria amount.)
  - C) *Number of Adults with Less Income at exit* = Count all records whose *IncomeAtEntry* is within the row criteria range and had less income at exit than at entry (*IncomeChange* = “lt”).

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- D) *Number of Adults with Same Income at exit* = Count all records whose *IncomeAtEntry* is within the row criteria amount and who had the same income at exit and at entry (*IncomeChange* = "eq").
- E) *Number of Adults with More Income at exit* = Count all records whose *IncomeAtEntry* is within the row criteria range and who had more income at exit than at entry (*IncomeChange* = "gt").
- F) *Number of Adults with Unknown Income Change* = Count all adults' records whose *IncomeAtEntry* is within the row criteria range and whose income change is unknown (*IncomeChange* = "un"). *Average Change in Monthly Income Per Adult* = Add up the non-null values in *IncomeChangeAmount* for those clients whose *IncomeAtEntry* is within the row criteria range and divide the total by the total number of persons where *IncomeChangeAmount* is not null. The calculation should include people with the same income at exit as at entry (*IncomeChangeAmount* = 0) but exclude people with an unknown income at exit (*IncomeChangeAmount* is null). The total number of non-blank *IncomeChangeAmount* values should equal the Number of Adults at Entry-Number of Adults with Unknown Income at Exit for each income bracket.
3. Each row is a range of income, represented by *IncomeAtEntry* for all but one of the columns. For the "Number of Adults at Exit" column, the range of income is based on the *IncomeAtExit* instead of *IncomeAtEntry*. Determine the total records per row as follows:
- A) *No Income* = Count all applicable records where the income is between \$0 and \$0.99 at entry (*IncomeAtEntry* < 1).
- B) *\$1 - \$150* = Count all applicable records where the income is between \$1 and \$150 at entry (*IncomeAtEntry* is between \$1. and 150.99).
- C) *\$151 - \$250* = Count all applicable records where the income is between \$151 and \$250 at entry (*IncomeAtEntry* is between 151 and 250.99).
- D) *\$251 - \$500* = Count all applicable records where the income is between \$251 and \$500 at entry (*IncomeAtEntry* is between 251 and 500.99).
- E) *\$501 - \$750* = Count all applicable records where the income is between \$501 and \$750 at entry (*IncomeAtEntry* is between 501 and 750.99).
- F) *\$751 - \$1000* = Count all applicable records where the income is between \$751 and \$1000 at entry (*IncomeAtEntry* is between 751 and 1000.99).
- G) *\$1001 - \$1250* = Count all applicable records where the income is between \$1001 and \$1250 at entry (*IncomeAtEntry* is between 1001 and 1250.99).
- H) *\$1251 - \$1500* = Count all applicable records where the income is between \$1251 and \$1500 at entry (*IncomeAtEntry* is between 1251 and 1500.99).
- I) *\$1501 - \$1750* = Count all applicable records where the income is between \$1501 and \$1750 at entry (*IncomeAtEntry* is between 1501 and 1750.99).
- J) *\$1751 - \$2000* = Count all applicable records where the income is between \$1751 and \$2000 at entry (*IncomeAtEntry* is between 1751 and 2000.99).

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- K) *\$2001 or more* = Count all applicable records where the income is equal to or greater than \$2,001 at entry (*IncomeAtEntry* is equal to greater than 2001).
- L) *Don't Know / Refused* = Count all applicable records where *IncomeAtEntry* is 'Unknown'.
- M) *Information Missing* = Count all applicable records where *IncomeAtEntry* is NULL.
- N) In the total row, all columns are automatically generated except for last average monthly change value. This value should be calculated by adding the non-blank values for *IncomeChangeAmount* for all clients across all *IncomeAtEntry* categories, and dividing by the total number of non-null *IncomeChangeAmount* values (clients for whom the income change is known). This field should NOT be generated as an average of the averages calculated for each previous row.

### APR Q24: Client Monthly Cash-Income Amount by Entry and Latest Status

APR.xlsx, Sheet Name: Q23&Q24

#### Q24. Client Monthly Cash-Income Amount by Entry and Latest Status

##### Client Monthly Cash – Income Amount by Entry and Latest Status

##### Number of Adults

Program Entry	Entry Total	Follow-up Total	Less Income at Follow-up	Same Income at Follow-up	More Income at Follow-up	Unknown Income Change	Average Change (\$) Monthly Income per Adult
No Income							
\$1 - \$150							
\$151 - \$250							
\$251 - \$500							
\$501 - \$750							
\$751 - \$1,000							
\$1,001 - \$1,250							
\$1,251 - \$1,500							
\$1,501 - \$1,750							
\$1,751 - \$2,000							
\$2,001 +							
Don't Know/Refused							
Information Missing							
Total							

### Business Rules

1. Use the same general rules as Q23, but report on adults who did not exit during the operating year on their last program stay (stayers).
2. Rather than income at exit, use income from the most recent follow-up. If there is no income data dated after the client's program entry date, report the client in the "Unknown Income Change" column; do not compare the client's program entry data to itself.

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### Programming Instructions

#### Variables Used

#### Local Variables

*IncomeAtEntry* – Uses same calculation defined for the variable of the same name in Q23.

*IncomeMostRecent* - This variable represents income at the time of the most recent update (*MostRecentAssessment* = 'Y' and *EntryExit* <> "Entry") on the last program stay (*LastEpisode* = 'Y') of the reporting period for stayers (*LeaverOrStayer* = 'S'). In most cases, it will be equal to the [Total Monthly Income] as entered by the user, but given the variety of possible combinations of data in the Income and Sources data element, it will be necessary to apply the rules shown in the table below in order, until an *IncomeMostRecent* has been determined for each adult stayer. If there is not a record where *MostRecentAssessment* = 'Y' and *EntryExit* <> "Entry" (i.e. the client's income has not been updated since the time of program entry), set *IncomeMostRecent* = NULL and skip using the chart below.

Rule #	Total Monthly Income	Income Last 30 Days	Individual sources specified?	Individual source amounts entered?	Effective Income
1	> \$0.00	(any)	(any)	(any)	Total Monthly Income as entered
2	(any)	(any)	Yes	Yes**	Sum amounts for individual sources to get total monthly income
2.5	(any)	No	(any)	(any)	\$0.00
3	\$0.00	Yes or NULL	(any)	(any)	\$0.00
4	(any)	Don't Know or Refused	(any)	(any)	Unknown
5	(any)	(any)	(any)	(any)	NULL

**\*\* Note that any individual income amounts that lack a corresponding indication of the type of income source that was received will be treated as if the client were missing this income altogether.**

*IncomeChangeAmount* – Subtract *IncomeAtEntry* from *IncomeMostRecent* to populate the *IncomeChangeAmount* field. If either *IncomeAtEntry* or *IncomeMostRecent* are NULL or 'Unknown', set *IncomeChangeAmount* to NULL. (Note that there is also a variable of this name defined for Q23; in Q23, the value is based on *IncomeAtEntry* and *IncomeAtExit* rather than *IncomeAtEntry* and *IncomeMostRecent*.)

*IncomeChange* - Uses same calculation as defined for the variable of the same name in Q23.

#### Program Applicability

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1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

### **Program Type Codes**

Program Type = 2, 3, 4, 5, 6, 8, or 9

### **Programming Logic**

Use the same rules as described in the previous question, but report on stayers (*LeaverOrStayer*= “S”) instead of leavers and use *IncomeMostRecent* wherever *IncomeAtExit* would be used.

### **APR Q25: Client Cash-Income Sources by Exit Status**

APR.xlsx, Sheet Name: Q25

#### **Q25a1. Cash Income Sources – Leavers**

Type of Cash-Income Sources Number of Leavers				
	Total	Adults	Children	Age Unknown
Earned Income				
Unemployment Insurance				
SSI				
SSDI				
Veteran’s Disability				
Private Disability Insurance				
Worker’s Compensation				
TANF or Equivalent				
General Assistance				
Retirement (Social Security)				
Veteran’s Pension				
Pension from Former Job				
Child Support				
Alimony (Spousal Support)				
Other Source				
<b>Total</b>				

#### **Q25a2. Cash Income Number of Sources –Leavers**

Number of Cash-Income Sources Number of Leavers				
	Total	Adults	Children	Age Unknown

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No Sources				
1 + Source (s)				
Don't Know/Refused				
Missing this Information				
Total				

### Q25a1: Cash-Income Sources - Leavers

#### Business Rules

1. Report the number of persons with at least one cash-income source in questions 25a1 and 25b1, and by a count of specific cash income sources in 25a2 and 25b2. Each person served during the operating year should be reported only once in 25a2 and 25b2 (“Number of income sources”). However, a person can have multiple types of income sources and thus be reported in one or more categories in 25a1 and 25b1 (“Types of income sources”).
  - a. If the response for a specific income source is ‘Yes’, the client should be counted as receiving that income source.
  - b. If the response for a specific income source is ‘No’, do not count the client as receiving that income source.
  - c. If the response for a specific income source is blank / NULL, but there is a number greater than zero in the amount for that particular income source, the client should be counted as receiving that income source.
2. Report using data from each client’s last program stay during the operating year.
3. For leavers, each client’s reported income sources by exit status is based on information collected during the assessment closest to, but not greater than, the exit date (*MostRecentAssessment* = “Y”) of the most recent program stay (*LastEpisode*= “Y”).

#### Programming Instructions

##### Variables Used

##### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
IncBenSourceCode	IncomeBenefits	8/H	4.1B
IncomeBenType	IncomeBenefits	7/G	N/A

##### Global Variables

1. *AdultChild*
2. *LeaverOrStayer*
3. *MostRecentIncBen*

##### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach

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4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

### **Program Type Codes**

Program Type = 2, 3, 4, 5, 6, 8, or 9

### **Programming Logic**

1. Determine the applicable records for “Adults”, “Children”, and “Unknown” as follows:
  - A) *Adults* = Count all adult (*AdultChild* equals “Adult”) leavers (*LeaverOrStayer* equals “L”).
  - B) *Children* = Count all child (*AdultChild* equals “Child”) leavers (*LeaverOrStayer* equals “L”).
  - C) *Unknown* = Count all leavers (*LeaverOrStayer* equals “L”) with an unknown age (*AdultChild* equals “Unknown”).
  
2. Each row is a type of cash-income source. For each record where *MostRecentIncBen* is also equal to “Y”, count the total clients receiving the following benefits as follows:
  - A) *Earned Income* = All applicable records with an earned income (*SourceCode* = 1).
  - B) *Unemployment insurance* = All applicable records with Unemployment insurance (*SourceCode* = 2).
  - C) *Supplemental Security Income* = All applicable records with Supplemental Security Income (*SourceCode* = 3).
  - D) *Social Security Disability* = All applicable records with Social Security Disability (*IncBenSource* = 4)
  - E) *Veteran’s Disability* = All applicable records with Veteran’s Disability (*SourceCode* = 5).
  - F) *Private disability insurance* = All applicable records with private disability insurance (*SourceCode* = 6).
  - G) *Worker’s Compensation* = All applicable records with worker’s compensation (*SourceCode* = 7).
  - H) *TANF or equivalent* = All applicable records with TANF or an equivalent (*SourceCode* = 10)
  - I) *General assistance* = All applicable records with general assistance (*SourceCode* = 11).
  - J) *Retirement (Social Security)* = All applicable records with retirement income (*SourceCode* = 12)
  - K) *Veteran’s pension* = All applicable records with veteran’s pension (*SourceCode* = 13).
  - L) *Pension from former job* = All applicable records with pension from a former job (*SourceCode* = 14).

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- M) *Child Support* = All applicable records with child support (SourceCode = 15).
- N) *Alimony or other spousal* = All applicable records with alimony or other spousal support (SourceCode = 16).
- O) *Other* = All applicable records with any other form of cash benefit (SourceCode = 17). This should be an unduplicated count of clients with other sources of cash income; do not count a single client more than once, regardless of how many other sources of income s/he may have.

### Q25a2: Cash-Income Number of Sources - Leavers

#### Business Rules

1. Question 25a2 should be based on both the general question about whether a client has any cash income, as well as questions related to total amount and specific income sources.
  - a. If the response for a specific income source is 'Yes', the client should be counted as receiving that income source.
  - b. If the response for a specific income source is 'No', do not count the client as receiving that income source.
  - c. If the response for a specific income source is blank / NULL, but there is a number greater than zero in the amount for that particular income source, the client should be counted as receiving that income source.
2. A client should be reported as having "No Cash Income Sources" where the client specifically reported that he/she had no income in the [Income received from any source in past 30 days?] (4.1) field, and there is either no total income amount recorded or the total income amount recorded is \$0, and there is no data collected for specific sources or the answers about specific sources are all "no."
3. If a client reports having some income or has a total amount recorded, but has not reported any specific source, then that client should be reported as having "at least 1 cash-income source."
4. If a client is reported as having at least one specific source of income, then that client should be reported as having "1+ Source(s)."
5. "Don't Know/Refused" should only be reported if [Income received from any source in past 30 days?] is either "Don't Know" or "Refused" and if no specific sources have been recorded as "yes."
6. "Missing this information" should only be reported if data were not collected on "Income Source" generally, the client does not have an amount recorded in total income, and all questions regarding specific sources contain missing data.

#### Programming Instructions

##### Variables Used

##### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
IncomeLast30	ClientHistorical	8/H	4.1A
IncBenSourceCode	IncomeBenefits	8/H	4.01B

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## Global Variables

1. *AdultChild*
2. *MostRecentAssessment*
3. *LeaverOrStayer*

## Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

## Program Type Codes

Program Type = 2, 3, 4, 5, 6, 8, or 9

## Programming Logic

1. Determine the applicable records for “Adults”, “Children”, and “Unknown” as follows:
  - a. *Adult* = Count all Adult (*AdultChild*= “Adult”) leavers (*LeaverOrStayer*= “L”).
  - b. *Child* = Count all Child (*AdultChild*= “Child”) leavers (*LeaverOrStayer*= “L”).
  - c. *Unknown* = Count all leavers (*LeaverOrStayer*= “L”) with an unknown age (*AdultChild*= “Unknown”).
2. Each row reports clients based on the number of cash income sources they received (0, 1 or more, don’t know/refused, and missing). Determine the total records for each amount as follows:
  - a. *No cash-income sources* = All applicable records where their last assessment (*MostRecentAssessment*= “Y”) shows no income in the past 30 days (*IncomeLast30Days* equals 0) AND there were no total income amounts or specific sources or amounts recorded or those amounts were all zero.
  - b. *Receives at least 1 cash-income source* = All applicable records where their last assessment (*MostRecentAssessment*= “Y”) shows income in the past 30 days (*IncomeLast30Days* equals 1 OR a total income amounts was recorded OR at least one specific source or OR at least 1 specific amounts was recorded.
  - c. *Don’t Know / Refused* = All applicable records where the client either did not know or refused to give their income for the last 30 days(*IncomeLast30Days*= 8 or 9) AND there were no total income amounts or specific sources or amounts recorded as of their last assessment (*MostRecentAssessment* equals = “Y”).

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- d. *Missing this information* = All applicable records where their last assessment (*MostRecentAssessment*= “Y”) has no response for Income in Last 30 Days (*IncomeLast30Days* is blank) AND there were no total income amounts or specific sources or amounts recorded.

### Q25b1. Cash Income Sources –Stayers

**Type of Cash – Income Sources  
Number of Stayers**

	Total	Adults	Children	Age Unknown
Earned Income				
Unemployment Insurance				
SSI				
SSDI				
Veteran’s Disability				
Private Disability Insurance				
Worker’s Compensation				
TANF or Equivalent				
General Assistance				
Retirement (Social Security)				
Veteran’s Pension				
Pension from Former Job				
Child Support				
Alimony (Spousal Support)				
Other Source				
Total				

### Q25b2. Cash Income Number of Sources –Stayers

**Number of Cash-Income Sources  
Number of Stayers**

	Total	Adults	Children	Age Unknown
No Sources				
1 + Source (s)				
Don’t Know/Refused				
Missing this Information				
Total				

### Q25b1: Cash-Income Sources - Stayers

Follow the same logic used for 25a1, but report on stayers (*LeaverOrStayer* = “S”).

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### Q25b2: Number of Cash-Income Sources - Stayers

Follow the same logic used for 25a2, but report on stayers (*LeaverOrStayer* = "S").

### APR Q26: Client Non-Cash Benefits by Exit Status

APR.xlsx, Sheet Name: Q26

#### Q26a1. Non-Cash Benefit Sources – Leavers

##### Non-Cash Benefits Number of Leavers

	Total	Adults	Children	Age Unknown
Supplemental Nutritional Assistance Program				
MEDICAID Health Insurance				
MEDICARE Health Insurance				
State Children’s Health Insurance				
WIC				
VA Medical Services				
TANF Child Care Services				
TANF Transportation Services				
Other TANF-Funded Services				
Temporary Rental Assistance				
Section 8, Public Housing, Rental Assistance				
Other Source				
<b>Total</b>				

#### Q26a2. Number of Non-Cash Benefits Sources – Leavers

##### Number of Non-Cash Benefit Sources Number Leavers

	Total	Adults	Children	Age Unknown
No Sources				
1 + Source (s)				
Don’t Know/Refused				
Missing this Information				
<b>Total</b>				

## HUD Annual Performance Report (APR) Programming Specifications

### Q26a1 -Non-Cash Benefits Sources - Leavers

#### Business Rules

1. Report the number of leavers who receive non-cash benefits by the type(s) of benefit(s) received and by the number of benefits received. Each person served during the operating year should be reported only once in both 26a2 and 26b2 (“Number of Non-Cash Benefits”). However, a person can receive multiple types of non-cash benefits and thus be reported in one or more categories in 26a1 and 26b1 (“Types of non-cash benefits”).
2. For leavers, non-cash benefits by exit status is based on information collected during the assessment closest to, but not greater than, the exit date (*MostRecentAssessment* = “Y”) of the most recent program stay (*LastEpisode*= “Y”).

#### Programming Instructions

##### Variables Used

##### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
IncBenSourceCode	IncomeBenefits	8/H	4.2B
IncomeBenType	IncomeBenefits	7/G	N/A

##### Global Variables

1. *MostRecentIncBen*
2. *AdultChild*
3. *LeaverOrStayer*

##### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

##### Program Type Codes

Program Type = 2, 3, 4, 5, 6, 8, or 9

##### Programming Logic

1. Determine the applicable records for “Adults”, “Children”, and “Unknown” as follows:
  - A) *Adults* = Count all adult (*AdultChild*= “Adult”) leavers (*LeaverOrStayer* = “L”).

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- B) *Children* = Count all child (*AdultChild*= “Child”), leavers (*LeaverOrStayer* = “L”).
  - C) *Unknown* = Count all leavers (*LeaverOrStayer*= “L”) with an unknown age adult (*AdultChild*= “Unknown”).
2. Each row is a type of non-cash benefit. For each record where *MostRecentAssessment* is equal to “Y”, count the total clients receiving the following benefits as follows:
- A) *Supplemental Nutritional Assistance Program* = All applicable records with Supplemental Nutritional Assistance Program = “yes” (SourceCode= 1, value = 1).
  - B) *MEDICAID Health Insurance*= All applicable records with MEDICAID Health Insurance = “yes” (SourceCode= 2, value = 1).
  - C) *MEDICARE Health Insurance* = All applicable records with MEDICARE Health Insurance = “yes” (SourceCode= 3, value = 1).
  - D) *State Children’s Health Insurance* = All applicable records with State Children’s Health Insurance = “yes” (SourceCode= 4, value = 1).
  - E) *WIC* = All applicable records with WIC = “yes” (SourceCode= 5, value = 1).
  - F) *VA Medical Services*= All applicable records with VA Medical Services = “yes” (SourceCode= 6, value = 1).
  - G) *TANF Child Care services*= All applicable records with TANF Child Care services = “yes” (SourceCode= 7, value = 1).
  - H) *TANF transportation services*= All applicable records with TANF transportation services = “yes”(SourceCode= 10, value = 1).
  - I) *Other TANF-funded services*= All applicable records with Other TANF-funded services = “yes” (SourceCode= 11, value = 1).
  - J) *Temporary rental assistance*= All applicable records with temporary rental assistance = “yes” (SourceCode= 14, value = 1).
  - K) *Section 8, Public Housing, or other ongoing rental assistance* = All applicable records with veteran’s pension = “yes” (SourceCode= 12, value = 1).
  - L) *Other source* = All applicable records with some other non-cash source = “yes” (SourceCode= 13, value = 1).

### **Q26a2: Number of Non-Cash Benefits Sources – Leavers**

#### **Business Rules**

1. Question 26b should be based on both the general question about whether a client has any non-cash benefits and data elements related to specific benefits.
2. A client should be reported as having no sources of non-cash benefits if the client’s most recent assessment indicates the client does not receive any non-cash benefits ([Non-cash benefit received from any source in past 30 days?] (4.2) = “no”) and there is no data collected for specific benefits or the answers about specific benefits are all “no.”
3. If a client reports having some benefits ([Non-cash benefit received from any source in past 30 days?] = “yes”) but has not reported any specific benefit, or has reported at least one specific

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benefit regardless of the response to the general benefit question, then that client should be reported in the “1 + Source(s)” category.

4. A client should only be reported under “Don’t Know/Refused” if the client’s most recent assessment has no specific benefits recorded and [Non-cash benefit received from any source in past 30 days?] = “Don’t Know” or “Refused”.
5. “Missing this information” should only be reported if data were not collected on “Non-Cash Benefits” generally and all questions regarding specific benefits contain missing data.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
NonCashLast30Days	ClientHistorical	9/I	4.2A
IncBenSourceCode	IncomeBenefits	8/H	4.2B

#### Global Variables

1. *AdultChild*
2. *MostRecentAssessment*

#### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

#### Program Type Codes

Program Type = 2, 3, 4, 5, 6, 8, or 9

#### Programming Logic

For each record where *MostRecentAssessment* is equal to “Y”, count the total clients receiving the following benefits as follows:

1. Determine the applicable records for “Adults”, “Children”, and “Unknown” as follows:
  - a. *Adult* = Count all Adult (*AdultChild*= “Adult”) leavers (*LeaverOrStayer*= “L”).
  - b. *Child* = Count all Child (*AdultChild*= “Child”) leavers (*LeaverOrStayer*= “L”).

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- c. *Unknown* = Count all leavers (*LeaverOrStayer*= “L”) with an unknown age (*AdultChild*= “Unknown”).
2. Each row reports on clients based on the number of non-cash benefits they received. Determine the total records for each amount as follows:
- a. *No non-cash benefits* = All applicable records where the last assessment (*MostRecentAssessment*= “Y”) shows no non-cash benefits in the past 30 days (*NonCashBenefitsLast30Days* equals 0) and no specific non-cash benefits have been recorded.
  - b. *Receives at least 1 non-cash benefit*= All applicable records where the last assessment (*MostRecentAssessment*= “Y”) shows non-cash benefits in the past 30 days (*NonCashBenefitsLast30Days*= 1) or at least one specific non-cash benefit has been recorded.
  - c. *Don’t Know / Refused* = All applicable records where the client either did not know or refused to give their non-cash benefits information (*NonCashBenefitsLast30Days*= 8 or 9) and no specific non-cash benefits have been recorded as of their last assessment (*MostRecentAssessment*= “Y”).
  - d. *Missing this information* = All applicable records where their last assessment (*MostRecentAssessment*= “Y”) has no response for non-cash benefits in Last 30 Days (*NonCashBenefitsLast30Days* is blank) and no specific non-cash benefits have been recorded.

### Q26b1. Non-Cash Benefit Sources – Stayers

	Non-Cash Benefits Number Stayers			
	Total	Adults	Children	Age Unknown
Supplemental Nutritional Assistance Program				
MEDICAID Health Insurance				
MEDICARE Health Insurance				
State Children’s Health Insurance				
WIC				
VA Medical Services				
TANF Child Care Services				
TANF Transportation Services				
Other TANF-Funded Services				
Temporary Rental Assistance				
Section 8, Public Housing, Rental Assistance				
Other Source				
Total				

### Q26b2. Number of Non-Cash Benefits– Stayers

	Number of Non-Cash Benefits Sources Number of Stayers			
	Total	Adults	Children	Age Unknown

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No Sources				
1 + Source (s)				
Don't Know/Refused				
Missing this Information				
Total				

### Q26b1: Non-Cash Benefits Sources - Stayers

Follow the same logic used for 26a1, but report on stayers instead of leavers (*LeaverOrStayer* = "S").

### Q26b2: Number of Non-Cash Benefits Sources - Stayers

Follow the same logic used for 26b2, but report on stayers instead of leavers (*LeaverOrStayer* = "S").

### APR Q27: Length of Participation by Exit Status

APR.xlsx, Sheet Name: Q27&Q28

**Length of Participation by Exit Status  
Number of Persons**

	Total	Leavers	Stayers
30 days or less			
31 to 60 days			
61 to 180 days			
181 to 365 days			
366 to 730 Days (1-2 Yrs)			
731 to 1095 Days (2-3 Yrs)			
1096 to 1460 Days (3-4 Yrs)			
1461 to 1825 Days (4-5 Yrs)			
More than 1825 Days (> 5 Yrs)			
Information Missing			
Total			

**Average and Median Length of Participation in Days**

	Average Length	Median Length
Leavers		
Stayers		

### Q27a: Length of participation ranges

#### Business Rules

1. In question 27a, record the length of participation for all persons based on the length of their current or mostly recently completed program stay, separately reported for leavers and stayers .

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2. The length of participation accounts for the total number of days associated with a client's most recent program stay. The length of participation reported in this question should include any time before the beginning of the reporting period, so long as it is part of the client's last program stay during the operating year.
3. If a client is served more than once during the operating year, the length of participation should be based on the client's most recent program stay prior to the end of the operating year.
4. If a person is still enrolled on the last day of the operating year, the length of stay should be calculated based on the number of days from the most recent program entry to the last day of the operating year. It should not include any time beyond the end of the operating year.

### **Programming Instructions**

#### ***Variables Used***

#### ***Fields Referenced from the HUD HMIS Data Standards***

None

#### ***Global Variables***

1. *LastEpisode*
2. *LengthOfStay*
3. *LeaverOrStayer*

#### ***Program Applicability***

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

#### ***Program Type Codes***

Program Type = 2, 3, 4, 5, 6, 8, or 9

#### ***Programming Logic***

1. For each column, determine the applicable records for leavers or stayers as follows
  - A) "Leavers" = Count all leavers (*LeaverOrStayer* = "L")
  - B) Stayers = Count all Stayers (*LeaverOrStayer* = "S")
2. Each row represents an amount of time the person stayed in the program in their last program stay up until the last day of the reporting period, inclusive of any days prior to the reporting period.

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- A) *30 days or less* = Count all records where the last program stay (*LastEpisode*= “Y”) had a length of stay 30 days or less (*LengthOfStay* is less than or equal to 30).
- B) *31 to 60 days* = Count all records where the last program stay (*LastEpisode*= “Y”) had a length of stay between 31 and 60 days (*LengthOfStay* is greater than or equal to 31 but less than or equal to 60).
- C) *61 to 180 days* = Count all records where the last program stay (*LastEpisode*= “Y”) had a length of stay between 61 and 180 days (*LengthOfStay* is greater than or equal to 61 but less than or equal to 180).
- D) *181 to 365 days* = Count all records where the last program stay (*LastEpisode*= “Y”) had a length of stay between 181 and 365 days (*LengthOfStay* is greater than or equal to 181 but less than or equal to 365).
- E) *366 to 730 days* = Count all records where the last program stay (*LastEpisode*= “Y”) had a length of stay between 366 and 730 days (*LengthOfStay* is greater than or equal to 366 but less than or equal to 730).
- F) *731 to 1095 days* = Count all records where the last program stay (*LastEpisode*= “Y”) had a length of stay between 731 and 1095 days (*LengthOfStay* is greater than or equal to 731 but less than or equal to 1095).
- G) *1096 to 1460 days* = Count all records where the last program stay (*LastEpisode*= “Y”) had a length of stay between 1096 and 1460 days (*LengthOfStay* is greater than or equal to 1096 but less than or equal to 1460).
- H) *1461 to 1825 days* = Count all records where the last program stay (*LastEpisode*= “Y”) had a length of stay between 1461 and 1825 days (*LengthOfStay* is greater than or equal to 1461 but less than or equal to 1825).
- I) *More than 1825 days* Count all records where the last program stay (*LastEpisode*= “Y”) had a length of stay greater than 1825 days (*LengthOfStay* is greater than 1825).
- J) *Missing this information* = Count all records where the last program stay (*LastEpisode* equals “Y”) had an unknown length of stay (*LengthOfStay* is blank).

### **Q27b: Average and Median Length of Participation (in days)**

#### **Business Rules**

1. *Based on last program stay* for each client, report the *average and* median length of participation in days, separately reported for Leavers and Stayers.

#### **Programming Instructions**

##### **Variables Used**

##### **Fields Referenced from the HUD HMIS Data Standards**

None. All calculations are based on derived fields.

##### **Global Variables**

1. *LastEpisode*

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2. LengthOfStay
3. *LeaverOrStayer*

### **Program Applicability**

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

### **Program Type Codes**

Program Type = 2, 3, 5, 8, or 9

### **Programming Logic**

1. Determine the Average length in days for ...
  - a. *Total number of persons* = Add up the length of stay (*LengthOfStay*) for each last program stay (*LastEpisode*= "Y"), and divide the sum by the number of last episodes (*LastEpisode*= "Y") where the length of stay is known (*LengthOfStay* is not blank).
  - b. *Leavers* = Add up the length of stay (*LengthOfStay*) of each last program stay (*LastEpisode*= "Y") for each leaver (*LeaverOrStayer*= "L"), and divide the sum by the number of last episodes (*LastEpisode*= "Y") for leavers (*LeaverOrStayer*= "L") where the length of stay is known (*LengthOfStay* is not blank).
  - c. *Stayers* = Add up the length of stay (*LengthOfStay*) of each last program stay (*LastEpisode*= "Y") for each stayer (*LeaverOrStayer*= "S"), and divide the sum by the number of last episodes (*LastEpisode*= "Y") for stayers (*LeaverOrStayer* equals "S") where the length of stay is known (*LengthOfStay* is not blank).
2. Determine the median length in days. To determine the median in the absence of a built-in "median" function, order all applicable records by the *LengthOfStay* value. Select the value for the record that falls in the middle of the list. If the total list consists of an even number of records, average the values of the two middle records.
  - a. *Total number of persons* = Find the median of all the length of stays (*LengthOfStay*) where the length of stay is known (*LengthOfStay* is not blank), based on each client's last program stay (*LastEpisode*= "Y").
  - b. *Leavers* = Find the median of all the length of stays (*LengthOfStay*) where the length of stay is known (*LengthOfStay* is not blank), it was the last program stay (*LastEpisode*= "Y") and the client was a leaver (*LeaverOrStayer*= "L").
  - c. *Stayers* = Find the median of all the length of stays (*LengthOfStay*) where the length of stay is known (*LengthOfStay* is not blank), it was the last program stay (*LastEpisode*= "Y") and the client was a stayer (*LeaverOrStayer*= "S").

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### APR Q29a1: Destination by Household Type and Length of Stay (All Leavers who Stayed More than 90 Days)

APR.xlsx, Sheet Name: Q29a1

#### 29a1. Exit Destination Number of Leavers in Households

##### Permanent Destinations

	Total	Without Children	With Children and Adults	With Only Children	Unknown Type
Owned by client, no ongoing subsidy					
Owned by client, with ongoing subsidy					
Rental by client, no ongoing subsidy					
Rental by client, VASH Subsidy					
Rental by client, ongoing subsidy other					
PSH for homeless persons					
Living with family, permanent tenure					
Living With friends, permanent tenure					

##### Temporary Destinations

Emergency shelter					
TH for homeless persons					
Staying with family, temporary tenure					
Staying with friends, temporary tenure					
Place not meant for human habitation					
Safe Haven					
Hotel or motel, paid by client					

##### Institutional Settings

Foster care or group foster care home					
Psychiatric facility					
Substance abuse or detox facility					
Hospital (non-Psychiatric)					
Jail, prison or juvenile detention facility					

##### Other Destinations

Deceased					
Other					
Don't Know/Refused					
Information Missing					
<b>Total</b>					

### Business Rules

1. For all leavers, report the total number of persons who exited to each destination by household type and length of participation. If a client was served more than once during the operating

## HUD Annual Performance Report (APR) Programming Specifications

year, destination data should be based on information collected at the last program exit prior to the end of the operating year.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
Destination	ProgramParticipation	17/Q	4.10

#### Global Variables

1. *HouseholdTypeClient*
2. *LastEpisode*
3. *LengthOfStay*
4. *LeaverOrStayer*

#### Program Applicability

1. SHP-TH
2. SHP-PH
3. SHP-SSO Outreach
4. SHP-SSO With Housing Goal
5. SHP-SSO Without Housing Goal
6. SHP-SH
7. S+C
8. SRO
9. HPRP

#### Program Type Codes

Program Type = 2, 3, 4, 5, 6, 8, or 9

#### Programming Logic

1. Each column is a housing configuration type, represented by *HouseholdTypeClient*. Determine the applicable records for each column as follows:
  - A) *Number of persons in households without children who exited and ...* = Count all records where the client left during the reporting period (*LeaverOrStayer*= "L"), stayed longer than 90 days (*LengthOfStay* is greater than 90), and was in a household with no children (*HouseholdTypeClient*= "HHNoKids").
  - B) *Number of persons in households with at least one adult and one child who exited and ...* = Count all records where the client left during the reporting period (*LeaverOrStayer*= "L"), stayed longer than 90 days (*LengthOfStay* is greater than

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90),and was in a household with both children and adults (*HouseholdTypeClient*=  
“*AdultChild*”).

- C) *Persons in households with only children who exited and ...* = Count all records where the client left during the reporting period (*LeaverOrStayer*= “L”), stayed longer than 90 days (*LengthOfStay* is greater than 90),and was in a household with only children (*HouseholdTypeClient*= “*HHKidsOnly*”).
- D) *Number of persons with unknown configuration and ...* = Count all records where the client left during the reporting period (*LeaverOrStayer*= “L”), stayed longer than 90 days (*LengthOfStay* is greater than 90),and was in an unknown housing configuration (*HouseholdTypeClient*= “*Unknown*”)

2. Each row is a destination, represented by *Destination*. Determine the total records for each row as follows:

- A) *Owned by client, no ongoing housing subsidy*= Count all applicable records where *Destination* = 11.
- B) *Owned by client, with ongoing housing subsidy* = Count all applicable records where *Destination* = 21.
- C) *Rental by client, no ongoing housing subsidy* = Count all applicable records where *Destination* = 10.
- D) *Rental by client, VASH Subsidy* = Count all applicable records where *Destination* = 19.
- E) *Rental by client, other (Non-VASH) ongoing housing subsidy* = Count all applicable records where *Destination* = 20.
- F) *Permanent supportive housing for formerly homeless persons (such as SHP, S+C, or SRO Mod Rehab)* = Count all applicable records where *Destination* = 3.
- G) *Staying or living with family, permanent tenure* = Count all applicable records where *Destination* = 22.
- H) *Staying or living with friends, permanent tenure* = Count all applicable records where *Destination* = 23.
- I) *Emergency shelter, including hotel or motel paid for with emergency shelter voucher* = Count all applicable records where *Destination* = 1.
- J) *Transitional housing for homeless persons (including homeless children)* = Count all applicable records where *Destination* = 2.
- K) *Staying or living with family, temporary tenure (e.g., room, apartment or house)* = Count all applicable records where *Destination* = 12.
- L) *Staying or living with friends, temporary tenure (e.g., room apartment or house)* = Count all applicable records where *Destination* = 13.
- M) *Place not meant for human habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)* = Count all applicable records where *Destination* = 16.
- N) *Safe Haven* = Count all applicable records where *Destination* = 18.

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- O) Hotel or motel paid for without emergency shelter voucher* = Count all applicable records where Destination = 14.
- P) Foster care home or foster care group home* = Count all applicable records where Destination = 15.
- Q) Psychiatric hospital or other psychiatric facility* = Count all applicable records where Destination = 4.
- R) Substance abuse treatment facility or detox center* = Count all applicable records where Destination = 5.
- S) Hospital (non-psychiatric)* = Count all applicable records where Destination = 6.
- T) Jail, prison or juvenile detention facility* Count all applicable records where Destination = 7.
- U) Deceased* = Count all applicable records where Destination = 24.
- V) Other* = Count all applicable records where Destination = 17.
- W) Don't know / refused* = Count all applicable records where Destination = 8 or 9.
- X) Information Missing* = Count all applicable records where Destination is blank.

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### APR Q29a2: Destination by Household Type and Length of Stay (All Leavers who Stayed 90 Days or Less)

APR.xlsx, Sheet Name: Q29a2

#### Q29a2. Destination by Households Less than 90 days

**Destination by Household Type and Length of Stay 90 days or Less  
Number of Persons in Households  
All Leavers**

##### Permanent Destinations

	Total	Without Children < 90 days	With Children and Adults < 90 days	With Only Children < 90 days	Unknown
Owned by client, no ongoing subsidy					
Owned by client, with ongoing subsidy					
Rental by client, no ongoing subsidy					
Rental by client, VASH Subsidy					
Rental by client, other (Non-VASH) ongoing subsidy					
PSH for homeless persons					
Living with family, permanent tenure					
Living with friends, permanent tenure					

##### Temporary Destinations

Emergency shelter					
Transitional housing for homeless persons					
Staying with family, temporary tenure					
Staying with friends, temporary tenure					
Place not meant for human habitation					
Safe Haven					
Hotel or motel, paid by client					

##### Institutional Settings

Foster care or group foster care home					
Psychiatric facility					
Substance abuse or detox facility					
Hospital (non-psychiatric)					
Jail, prison or juvenile detention facility					

##### Other Destinations

Deceased					
Other					
Don't Know/Refused					
Information Missing					
<b>Total</b>					

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The logic and variables used within 29a2 are the same as 29a1 with the exception that 29a2 only applies to clients who stayed a total of 90 days or less. Refer to the programming instructions for 29a1 for the remainder of the rules to this section.

### APR Q36: Primary Performance Measures by Program Type

APR.xlsx, Sheet Name: Sec 5 Q36a-c

#### Q36a. Permanent Housing Programs

For the purposes of question 36a, Permanent Housing Programs also includes Permanent Supportive Housing programs.

Performance measure	Description
1. Housing stability measure	The % of persons who remained in the permanent housing program as of the end of the operating year or exited to permanent housing (subsidized or unsubsidized).
2a. Total income measure	The % of persons age 18 and older who maintained or increased their total income (from all sources) as of the end of the operating year or program exit.
2b. Earned income measure	The % of persons age 18 through 61 who maintained or increased their earned income as of the end of the operating year or program exit.

Performance Measure	Exhibit 2 Target # of persons who were expected to accomplish this measure	Exhibit 2 Target % of persons who were expected to accomplish this measure	Actual # of persons in the program for whom the measure is appropriate	Actual # of persons who accomplished this measure	Actual % of persons who accomplished this measure	% Difference between Exhibit 2 Target and Actual Performance
1. Housing stability measure						
2a. Total income measure						
2b. Earned income measure						

#### Business Rules

1. Reporting requirements for question 36 are based on the program type and the specific measures and benchmarks selected by the project as part of the application and technical submission process.
2. Q36a reports on three performance measures:

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- a. Of all clients served during the operating year, how many remained in the permanent housing program (stayers) or exited to any type of permanent housing.
- b. Of all adults served during the operating year, how many either maintained or increased their total income relative to when they entered the program.
- c. Of adults age 18 through 61 served during the operating year, how many either maintained or increased their earned income relative to when they entered the program.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
Destination	ProgramParticipation	17/Q	4.10
SourceCode	IncomeBenefits	8/H	4.1
ProgramType	AgencyProgram	8/H	2.8

#### Global Variables

1. *ProgramType\_APRReport*
2. *LeaverOrStayer*
3. *AgeAtLastEntry*
4. *IncomeChange*

#### Local Variables

*IncomeChange\_EarnedIncome* - Used to determine whether or not the [Earned Income] level increased, decreased or remained the same for the client during their stay. The simple formula used to determine this is [Earned Income] at *MostRecentAssessment* minus the [Earned Income] at entry. If the resulting value is greater than 0 then indicate this by setting the field to "gt", if it is less than 0 set the field to "lt", and if it is equal to 0 then set the field to "eq".

*PermHousingDestination* –Set *PermHousingDestination* to “Y” for all applicable records where the client was a leaver (*LeaverOrStayer*= “L”) and [Destination] equals any of the following:

1. *Owned by client, no ongoing housing subsidy* = 11.
2. *Owned by client, with ongoing housing subsidy* = 21.
3. *Rental by client, no ongoing housing subsidy* = 10.
4. *Rental by client, VASH Subsidy* = 19.
5. *Rental by client, other (Non-VASH) ongoing housing subsidy* = 20.
6. *Permanent supportive housing for formerly homeless persons (such as SHP, S+C, or SRO Mod Rehab)* = 3.
7. *Staying or living with family, permanent tenure* = 22.

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8. *Staying or living with friends, permanent tenure = 23.*

### **Program Applicability**

1. SHP-PH
2. S + C
3. SRO

### **Program Type Codes**

Program Type = 3 or 9

### **Programming Logic**

1. For permanent housing programs:
  - A) Housing stability measure:
    - i. *Actual # of persons who accomplished this measure =* Count all the records where the client was a “stayer” (*LeaverOrStayer = "S"*) or the client was a leaver (*LeaverOrStayer = "L"*) and exited to a permanent destination (*PermHousingDestination = "Y"*).
    - ii. *Total # of persons for whom the measure is appropriate =* Count all persons served by the program during the operating year.
  - B) Total income measure:
    - i. *Actual # of persons who accomplished this measure =* Count all records where the client is an Adult (*AdultChild = "Adult"*) and their total income either stayed the same or increased (*IncomeChange = "eq"* or *IncomeChange = "gt"*). ***Note that clients who do not have any income at entry (IncomeAtEntry = \$0) as well as no income at follow up/exit (IncomeMostRecent = \$0) should not be counted as maintaining their income.***
    - ii. *Total # of persons for whom the measure is appropriate =* Count of all adults (*AdultChild = "Adult"*) served during the operating year.
  - C) Earned income measure:
    - i. *Actual # of persons who accomplished this measure =* Count all records where the client is between 18 and 61 (*AgeAtLastEntry* is between 18 and 61) and who either maintained or increased their earned income (*IncomeChange\_EarnedIncome = "eq"* or *IncomeChange\_EarnedIncome = "gt"*).
    - ii. *Total # of persons for whom the measure is appropriate =* Count all persons served during the operating year where the client’s *AgeAtLastEntry* is between 18 and 61.

### **Q36b. Transitional Housing Programs**

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Performance measure	Description
1. Housing stability measure	The % of persons who exited to permanent housing (subsidized or unsubsidized) during the operating year.
2a. Total income measure	The % of persons age 18 and older who increased their total income (from all sources) as of the end of the operating year or program exit.
2b. Earned income measure	The % of persons age 18 through 61 who increased their earned income as of the end of the operating year or program exit.

Performance Measure	Exhibit 2 Target # of persons who were expected to accomplish this measure	Exhibit 2 Target % of persons who were expected to accomplish this measure	Total # of persons in the program for whom the measure is appropriate	Actual # of persons who accomplished this measure	Actual % of persons who accomplished this measure	% Difference between Exhibit 2 Target and Actual Performance
1. Housing stability measure						
2a. Total income measure						
2b. Earned income measure						

### Business Rules

1. Q36b reports on three performance measures:
  - a. Of all clients who exited during the operating year (leavers), how many exited to any type of permanent housing.
  - b. Of all adults served during the operating year, how many increased their total income relative to when they entered the program.
  - c. Of adults age 18 through 61 served during the operating year, how many increased their earned income relative to when they entered the program.

### Programming Instructions

#### **Variables Used**

Variables are the same as Q36a.

#### **Fields Referenced from the HUD HMIS Data Standards**

## HUD Annual Performance Report (APR) Programming Specifications

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
Destination	ProgramParticipation	17/Q	4.1
ProgramType	AgencyProgram	8/H	2.8

### Global Variables

1. *ProgramType\_APRReport*
2. *LeaverOrStayer*
3. *AgeAtLastEntry*
4. *IncomeChange*

### Local Variables

*IncomeChange\_EarnedIncome* - Used to determine whether or not the [Earned Income] level increased, decreased or remained the same for the client during their stay. The simple formula used to determine this is [Earned Income] at *MostRecentAssessment* minus the [Earned Income] at entry. If the resulting value is greater than 0 then indicate this by setting the field to "gt", if it is less than 0 set the field to "lt", and if it is equal to 0 then set the field to "eq".

*PermHousingDestination* – this field is used to identify all applicable records where the client was a “leaver” (LeaverOrStayer equals “L” and [Destination] equals any of the following:

1. *Owned by client, no ongoing housing subsidy* = Destination equals 11.
2. *Owned by client, with ongoing housing subsidy* = Destination equals 21.
3. *Rental by client, no ongoing housing subsidy* = Destination equals 10.
4. *Rental by client, VASH Subsidy* = Destination equals 19.
5. *Rental by client, other (Non-VASH) ongoing housing subsidy* = Destination equals 20.
6. *Permanent supportive housing for formerly homeless persons (such as SHP, S+C, or SRO Mod Rehab)* = Destination equals 3.
7. *Staying or living with family, permanent tenure* = Destination equals 22.
8. *Staying or living with friend s, permanent tenure* = Destination equals 23.

### Program Applicability

1. SHP-TH

### Program Type Codes

Program Type = 2

### Programming Logic

1. For transitional housing programs (ProgramType\_APRReport equals “SHP-TH”):
  - A) Housing stability measure:

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- i. *Actual # of persons who accomplished this measure* = Count all leavers (*LeaverOrStayer* = "L") where *PermHousingDestination* = "Y".
- ii. *Total # of persons for whom the measure is appropriate* = Count all leavers (*LeaverOrStayer* is equal to "L").

### B) Total income measure:

- i. *Actual # of persons who accomplished this measure* = Count all records where the client is an adult (*AdultChild* = "Adult") and their total income increased (*IncomeChange* = "gt").
- ii. *Total # of persons for whom the measure is appropriate* = Count all adults (*AdultChild* = "Adult") served during the operating year.

### C) Earned income measure:

- i. *Actual # of persons who accomplished this measure* = Count all records where the client is between 18 and 61 and who increased their earned income (*IncomeChange\_EarnedIncome* = "gt").
- ii. *Total # of persons for whom the measure is appropriate* = Count all persons served during the operating year where the client's *AgeAtLastEntry* is between 18 and 61.

## Q36c. Street Outreach Programs

Performance measure	Description
Measure 1: Housing stability measure	The % of persons placed into housing (ES, TH, SH, or PSH) as a result of the street outreach program during the operating year.
Measure 2a: Physical Disability service linkage	Among persons who entered with an unmet service need associated with a <i>physical disability</i> , the % of these persons who received services for that condition by the time they exited.
Measure 2b: Developmental Disability service linkage	Among persons who entered with an unmet service need associated with a <i>developmental disability</i> , the % of these persons who received services for that condition by the time they exited.
Measure 2c: Chronic Health service linkage	Among persons who entered with an unmet service need associated with a <i>chronic health condition</i> , the % of these adults who received services for that condition by the time they exited.
Measure 2d: HIV/AIDS service linkage	Among persons who entered with an unmet service need associated with <i>HIV/AIDS</i> , the % of these adults who received services for that condition by the time they exited.

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Measure 2e: Mental Health service linkage	Among persons who entered with an unmet service need associated with a <i>mental health condition</i> , the % of these persons who received services for that condition by the time they exited.
Measure 2f: Substance abuse service linkage	Among persons who entered with an unmet service need associated with a <i>substance abuse</i> , the % of these persons who received services for that condition by the time they exited.

Key	Exhibit 2 Target # of persons who were expected to accomplish this measure	Exhibit 2 Target % of persons who were expected to accomplish this measure	Actual # of persons served by the program, as applicable to this measure	Actual # of persons who accomplished this measure	Actual % of persons who accomplished this measure	% Difference between Exhibit 2 Target and Actual Performance
Measure 1						
Measure 2a						
Measure 2b						
Measure 2c						
Measure 2d						
Measure 2e						
Measure 2f						

### Business Rules

Q36c reports on seven performance measures: One housing stability measure, and several service linkage measures.

1. Of all clients who exited during the operating year (leavers), how many exited to some type of housing.
2. Street outreach programs have the option of selecting multiple service linkage measures. The total persons from whom each measure is appropriate are leavers who entered the program with a specific physical or mental health condition, who were not receiving services for that condition at time of program entry. The persons who accomplished the outcome should be those who had received services for the condition by the time they exited.

### Programming Instructions

#### Variables Used

#### Fields Referenced from the HUD HMIS Data Standards

## HUD Annual Performance Report (APR) Programming Specifications

Primary Field Name	Table	HUD CSV REF	HUD Data Standards Reference
Destination	ProgramParticipation	17/Q	4.1
ProgramType	AgencyProgram	8/H	2.8
PhysicalDisability	ClientHistorical	10/J	4.3A
ReceivePhysicalDisabilityServices	ClientHistorical	11/K	4.3B
DevelopmentalDisability	ClientHistorical	12/L	4.4A
ReceiveDevelopmentalDisabilityServices	ClientHistorical	13/M	4.4B
ChronicHealthCondition	ClientHistorical	14/N	4.5A
ReceiveChronicHealthConditionServices	ClientHistorical	15/O	4.5B
HasHIVAIDS	ClientHistorical	16/P	4.6A
ReceiveHIVAIDSServices	ClientHistorical	17/Q	4.6B
HasMentalHealthProblem	ClientHistorical	18/R	4.7A
ReceiveMentalHealthServices	ClientHistorical	20/T	4.7C
HasSubstanceAbuseProblem	ClientHistorical	21/U	4.8A
ReceiveSubstanceAbuseServices	ClientHistorical	23/W	4.8C

### Global Variables

1. ProgramType\_APRReport
2. LeaverOrStayer

### Local Variables

None

### Program Applicability

1. SHP-SSO Outreach

### Program Type Codes

Program Type = 4

### Programming Logic

1. For street outreach programs (ProgramType\_APRReport equals "SHP-SSO"):
  - A) Measure 1: Housing stability measure:
    - i. *Actual # of persons who accomplished this measure* = Count all the records where the client was a "leaver" and was placed into housing (*Emergency shelter, Transitional housing for homeless persons, Permanent supportive housing, or Safe Haven*) (*LeaverOrStayer*= "L" and *Destination* equals any of the following destinations:
      1. *Emergency Shelter* = 1.
      2. *Transitional Housing for Homeless* = 2.
      3. *Owned by client, no ongoing housing subsidy* = 11.

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4. *Owned by client, with ongoing housing subsidy* = 21.
5. *Rental by client, no ongoing housing subsidy* = 10.
6. *Rental by client, VASH Subsidy* = 19.
7. *Rental by client, other (Non-VASH) ongoing housing subsidy* = 20.
8. *Permanent supportive housing for formerly homeless persons (such as SHP, S+C, or SRO Mod Rehab)* = 3.
9. *Staying or living with family, permanent tenure* = 22.
10. *Staying or living with friends, permanent tenure* = 23.

- ii. *Total # of persons for whom the measure is appropriate* = Count all leavers (*LeaverOrStayer* is equal to "L").

### B) Measure 2a: Physical Disability service linkage:

- i. *Actual # of persons who accomplished this measure* = Count all records where all of the following apply:
  1. The client was a "leaver" (*LeaverOrStayer* equals "L").
  2. The client entered with a physical disability (*PhysicalDisability* = 1).
  3. The client was not receiving physical disability services at program entry (*ReceivePhysicalDisabilityServices* = 0).
  4. The client subsequently reported receiving physical disability services on any later assessment (*ReceivePhysicalDisabilityServices* = 1).
- ii. *Total # of persons for whom the measure is appropriate* = Count all records where all of the following apply:
  1. The client was a "leaver" (*LeaverOrStayer* equals "L").
  2. The client entered with a physical disability (*PhysicalDisability* = 1).
  3. The client was not receiving physical disability services at program entry (*ReceivePhysicalDisabilityServices* = 0).

C) For the remaining service linkages (developmental disability, chronic health condition, HIV/AIDS, mental health, and substance abuse), apply the same logic as above, substituting *PhysicalDisability* with the corresponding need and service.

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**Q36d: Supportive Service Only (SSO) Programs with a Housing Goal (Excluding street outreach programs)**

The business rules and programming logic for this section match Q36b.

**Program Applicability**

1. SSO programs with a housing goal.

**Program Type Codes**

Program Type = 6

**Q36e. Safe Havens**

Performance measure	Description
Measure 1a – Housing Stability	The % of persons who remained in Safe Havens housing as of the end of the operating year or exited to permanent housing (subsidized or unsubsidized).
Measure 1b –Total Income Measure	The % of persons age 18 or older who maintained or increased their total income (from all sources) as of the end of the operating year or program exit.

Performance Measure	Exhibit 2 Target # of persons who were expected to accomplish this measure	Exhibit 2 Target % of persons who were expected to accomplish this measure	Total # of persons in the program for whom the measure is appropriate	Actual # of persons who accomplished this measure	Actual % of persons who accomplished this measure	% Difference between Exhibit 2 Target and Actual Performance
Measure 1						
Measure 2						

The business rules and programming logic for Q36e match the first two performance measures from Q36a.

**Program Applicability**

- 1.SHP-SH

**Program Type Codes**

Program Type = 8