



HUD - 40118 ANNUAL PERFORMANCE REPORT (APR)

Version # 12.20.06>

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HUD – 40118 ANNUAL PERFORMANCE REPORT (APR)

OVERVIEW

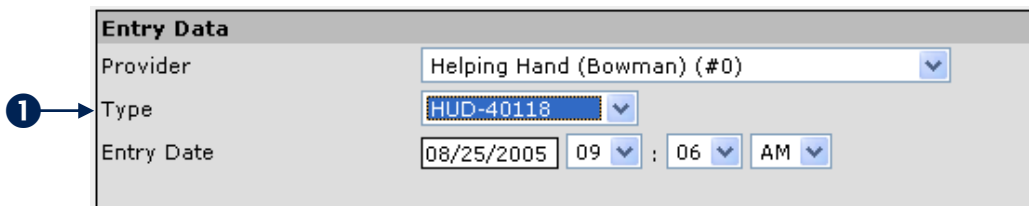
The goal of this document is to explain how data is pulled into the *HUD - 40118 Annual Performance Report (APR)*, providing a line-by-line description of each HUD field. It clarifies those sections of the HUD-40118 APR that are not easy to understand, including:

- ▶ Disability Information
- ▶ Monthly Income Information
- ▶ Chronically Homeless
- ▶ Non-Homeless Persons

It also describes how the HUD-40118 APR distinguishes between single individuals and family members. In addition, it explains how to correct a number of common data entry errors that result in an incomplete report.

Note: It is important to note that users can only run the canned HUD-40118 APR for one provider at a time. This rule excludes the System Administrator II and Agency Administrator access levels. Please refer to the ServicePoint 4.02 Release Notes for more information as to what each access level has the right to use.

The HUD-40118 APR pulls information only if **HUD-40118** is the option selected in the **Type** field on the **Entry Data** section of the client **Entry/Exit** screen (See Figure 1 ❶) and an entry date that is on, before, or during the reported period, and also has an exit date that is *null* or falls within or after the reporting period.



The screenshot shows a form titled "Entry Data" with the following fields:

Provider	Helping Hand (Bowman) (#0)
Type	HUD-40118
Entry Date	08/25/2005 09 : 06 AM

A blue circle with the number 1 and an arrow points to the "Type" field.

Figure 1

For purposes of the HUD-40118 APR, services are deemed to have been provided only if the client served has a recorded HUD entry/exit. The length of that service is defined by the exit date.

IMPORTANT

Client information will *not* be pulled into the HUD-40118 APR without a HUD-40118 *type* entry that falls within or overlaps the reporting period.

VALID HUD ENTRIES AND EXITS

The HUD-40118 APR accounts for *all* clients with a HUD-40118 entry except those who exited before the reporting period start date or entered after the reporting period end date. The following chart (See Figure 2), and related Key below, illustrates which Entries and Exits are counted in the HUD-40118 APR.

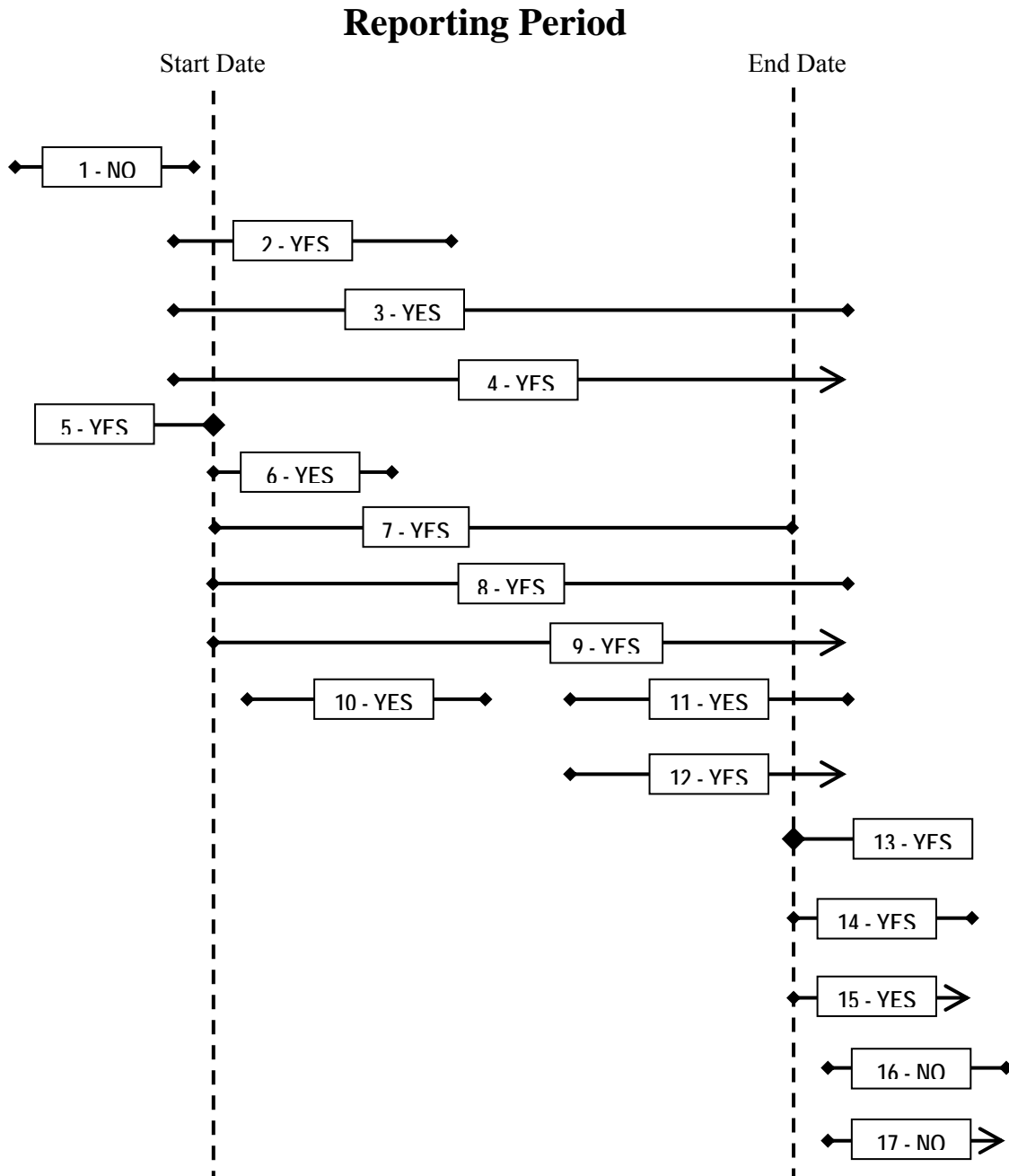


Figure 2

Key to Figure 2:

1. **NO:** Clients who entered and exited before the reporting period are *not* included in the report.
2. **YES:** Clients who entered before the reporting period and exited during the reporting period will be included in the report.
3. **YES:** Clients who entered before the reporting period and exited after the reporting period will be included in the report.
4. **YES:** Clients who entered before the reporting period and have not yet exited the program will be included in the report.
5. **YES:** Clients who entered and exited on the first day of the reporting period will be included in the report.
6. **YES:** Clients who entered on the first day of the reporting period and exited during the reporting period will be included in the report.
7. **YES:** Clients who entered on the first day of the reporting period and exited on the last day of the reporting period will be included in the report
8. **YES:** Clients who entered on the first day of the reporting period and exited after the reporting period will be included in the report.
9. **YES:** Clients who entered on the first day of the reporting period and have not yet exited will be included in the report.
10. **YES:** Clients who entered and exited during the reporting period will be included in the report.
11. **YES:** Clients who entered during the reporting period and exited after the reporting period will be included in the report.
12. **YES:** Clients who entered during the reporting period and have not yet exited will be included in the report.
13. **YES:** Clients who entered and exited on the last day of the reporting period will be included in the report.
14. **YES:** Clients who entered on the last day of the reporting period and exited after the reporting period will be included in the report.
15. **YES:** Clients who entered on the last day of the reporting period and have not yet exited will be included in the report.
16. **NO:** Clients who entered and exited after the reporting period will *not* be included in the report.
17. **NO:** Clients who entered after the reporting period and have not yet exited will *not* be included in the report.

IMPORTANT

Lines 1 and 16 – 21 of the official HUD-40118 are not included in the ServicePoint™ HUD-40118 APR. Due to the layout of the HUD-40118, as well as information that is not captured in ServicePoint, the ServicePoint HUD-40118 APR is not intended to be an end product which can be sent to HUD. Users are required to copy the numbers from the ServicePoint-40118 APR to the HUD form. Questions 1 and 16-21 are either agency specific, not related to ServicePoint, and/or consists of varying data that the system is unable to report on at this time.

FAMILY MEMBERS VS. SINGLES

The following standards are used to separate clients into families or singles in the HUD-40118 APR:

- ▶ Household members are *not* considered family members in the HUD-40118 APR unless they share an entry date. If they do not share an entry date, each client will be considered a single.
- ▶ HUD considers both singles and adults as participants. Singles are those individuals not included in a family. This includes children who enter without an accompanying adult.
- ▶ Household members share an entry date when the checkbox next to the name of each household member is selected on the entry screen. (See Figure 3 ❶)

Household members

To include household members in this entry/exit, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

❶ *test, john

*test, sally

Entry Data

Provider:

Type:

Entry Date: : : AM

Figure 3

- ▶ All household members who share an entry are counted as being in a family except under the following condition. If multiple household members enter together, and later all but one family member exits, the remaining person will be counted as a single on reports that have a start date after the day the other household members left the program. (See Figure 4)

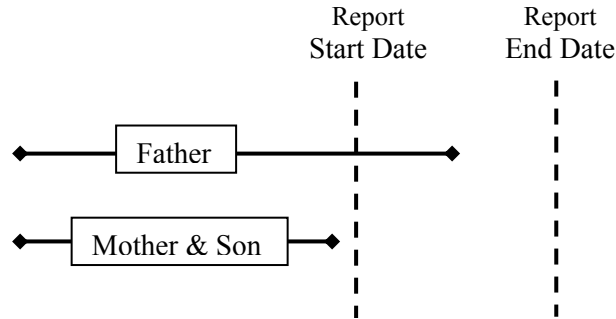


Figure 4

- Household members who enter on different dates, and have been entered as a related entry by using **Add Related Entry/Exit** option, will be pulled into the HUD-40118 APR as a family. (See Figure 5 ❶)

Overview - HUD-40118

Name	Entry Date	Exit Date	Reason Leaving	Destination
▶ Test, Chris	08/25/2005			
test, john	08/25/2005			

❶

Entry Data

Provider:

Type:

Entry Date: :

Figure 5

The exception to this rule is as follows: Depending on the reporting period start and end dates in contrast with the entry/exit dates, if one household member enters during the reporting period, then related household members enter after the reporting period, the household members will *not* be reported as a family. (See Figure 6)

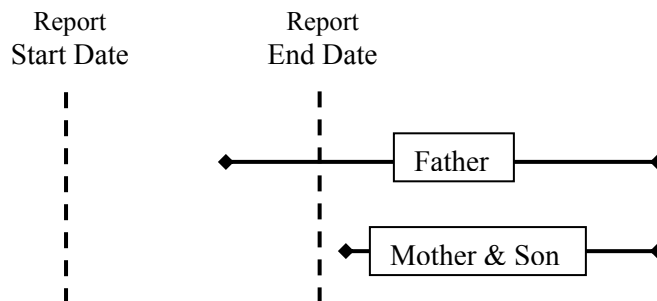


Figure 6

- Household members who enter on different dates without a related entry will always be pulled into the report as singles.

HUD APR LINE-BY-LINE

The following selections describe how to insure that *ServicePoint* data is pulled into the appropriate HUD-40118 APR lines.

Line 1: Projected Levels of Persons Served

Line one is *not* reported in *ServicePoint*.

Line 2: Persons Served During the Reporting Period

This line calculates the number of clients who are enrolled in the program during the reporting period.

IMPORTANT	
<p>A child who enters a program alone or with other children in the same household (without an accompanying adult), will be counted in the singles column.</p> <p>Likewise, if a head of household enters a program alone, they are counted as a single.</p>	

Line 2a: Number on the first day of the Reporting period

Clients who have a HUD entry before the reporting period start date, but do not have an exit date before the reporting period start date, will be included in Line 2a. (See Figure 7 ❶)

	2. Persons Served during the operating year.	Number of Singles Not in Families	Number of Adults in Families	Number of Children in Families	Number of Families
❶	a. Number on the first day of the operating year.	37	20	8	11
❷	b. Number entering program during the operating year.	25	6	3	4
❸	c. Number who left the program during the operating year.	8	5	3	3
❹	d. Number in the program on the last day of the operating year. (a+b-c=d)	54	21	8	12

Figure 7

(Also see 2. YES, 3. YES, and 4. YES on pages 4 and 5 of this document.)

Line 2b: Number entering program during the Reporting Period

Clients who have a HUD entry date on the first day of or after the reporting period start date, and either on or before the reporting period end date, with or without an exit date, will be included in Line 2b. ②

(Also see 5. YES, 6. YES, 7. YES, 8. YES, 9. YES, 10. YES, 11. YES, 12. YES, 13. YES, 14. YES, 15. YES, on pages 4 and 5 of this document.)

Line 2c: Number who left the program during the Reporting Period

Clients will be included in Line 2c if they had a HUD entry date prior to, on the first day of, or during the reporting period, and a HUD exit date during the reporting period. ③

(Also see 2. YES, 5. YES, 6. YES, 7. YES, and 10. YES, on pages 4 and 5 of this document.)

Line 2d: Number in the program on the last day of the Reporting Period

The number of clients who are still enrolled in the program on the last day of the reporting period appears in Line 2d. ④ This field subtracts the number that exited the program during the reporting period (Line 2c) from the combined number of those that entered the program during the reporting period (Line 2b) and those who were in the program on the first day of the reporting period (Line 2a): $a + b - c = d$.

Line 3: Project Capacity:

This line lists the number of clients in the program on the last day of the reporting period for **Number of Singles Not in Families** and **Number of Families**. (See Figure 8)

3. Project Capacity.	Number of Singles Not in Families	Number of Adults in Families	Number of Children in Families	Number of Families
a. Number on last day (from 2d, columns 1 and 4)	54			12

Figure 8

Line 4: Non-homeless Persons (Sec. 8 SRO projects only)

This line of the HUD-40118 APR applies to single room occupant (SRO) programs only. (See Figure 9)

4. Non-homeless persons. (Sec. 8 SRO projects only)	
How many income-eligible non-homeless persons were housed by the SRO program during the operating year?	57

Figure 9

The information that will be pulled into Line 4 of the report is dependent on the HUD 40118 Assessment question **Is Client Homeless?** (See Figure 10 ❶) and **Is Client Chronically Homeless?**. ❷

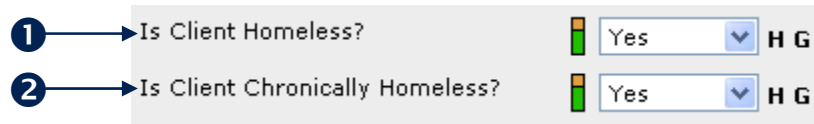


Figure 10

Either a **Null** or **No** answer to both of these questions prompt the system to include those clients in the total of **Non-homeless persons** on Line 4 of the HUD-40118 APR. If the Provider running the HUD-40118 APR is *not* a single room occupancy (SRO) provider, ignore Line 4 and do not use it in your final report to HUD.

The pool of clients checked for this line is a combination of questions 2a and 2b. The entry dates are on or before the report “To” date and exit dates are “null”, or on or after the report “From” date.

Line 5: Age and Gender

This line reports the **Age and Gender** of those clients who had an entry during the reporting period. (See Figure 11)

5. Age and gender.	Age	Male	Female	Other/Not given
Single Persons (from 2b, column 1)	a. 62 and over	0	0	0
	b. 51 - 61	0	0	0
	c. 31 - 50	2	3	0
	d. 18 - 30	2	2	3
	e. 17 and under	2	4	1
	Not given	0	0	6
Persons in Families (from 2b, columns 2 & 3)	f. 62 and over	0	0	0
	g. 51 - 61	0	0	0
	h. 31 - 50	1	1	1
	i. 18 - 30	1	1	0
	j. 13 - 17	1	0	0
	k. 6 - 12	0	0	0
	l. 1 - 5	0	0	1
	m. Under 1	0	0	1
	Not given	0	0	1

Figure 11

(Also see Line 2b on page 8 of this document.)

Information is pulled from the **Date of Birth** (See Figure 12 ❶) and **Gender** ❷ fields located in the **Additional Profile Information Assessment**, and other assessments that ask for the date of birth and gender of the client. Gender is sorted into an age group. The age group is determined by the client’s date of birth.

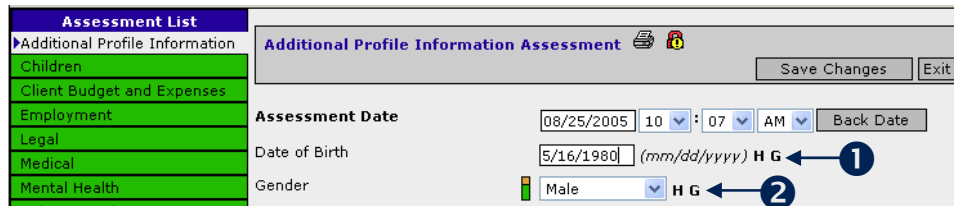


Figure 12

Note: Only clients who have an entry date on the first day of or during the reporting period will be included in Line 5. The age listed in the HUD-40118 APR is the client's age on their entry date.

This line pulls from the pool of clients in 2b, columns 1, 2 and 3. It includes all clients with a HUD entry date on or after the reporting period start date with or without a HUD exit date.

Line 6: Veterans

Line 6 of the HUD-40118 APR pulls clients who have been on active military status. (See Figure 13)

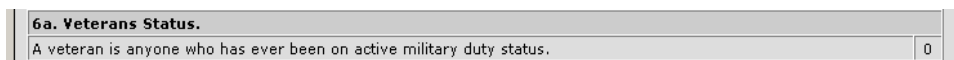


Figure 13

This line pulls from the pool of clients in 2b, columns 1 and 2. It includes all singles and adult clients in families, as identified by age, with a HUD entry date on or after the reporting date with or without a HUD exit date.

Line 6a: Veterans Status

Clients must meet the following criteria to be listed under Line 6.

- ◆ They must have a HUD entry date on the first day of or during the reporting period (Also see Line 2b on page 8 of this document.)
- ◆ They must be a participant as defined by HUD. Participant = Single or Adult in family, columns 1 & 2 of question 2.
- ◆ They must answer **Yes (HUD)** to the question **U.S. Military Veteran?**, located under the HUD Assessment entry Form. (See Figure 14 ①)

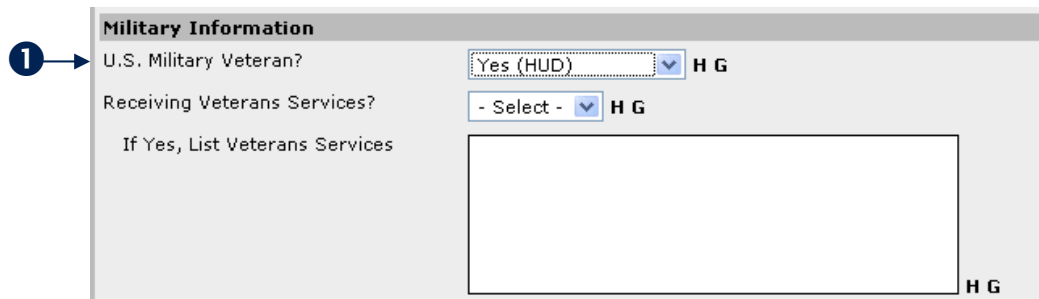


Figure 14

This question must be answered before or at the time of entry into the program.

Line 6b: Chronically Homeless

The information that populates Line 6b, **Chronically Homeless**, (See Figure 15) of the HUD-40118 APR is pulled directly from the HUD 40118 assessment, **Is Client Chronically Homeless?**.

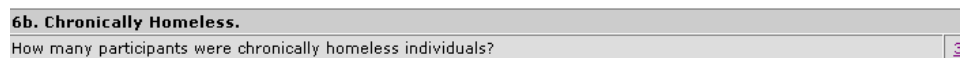


Figure 15

Clients with an answer of **Yes** to this question, and who entered on the first day of or during the reporting period, are included on Line 6b. (See Figure 16)

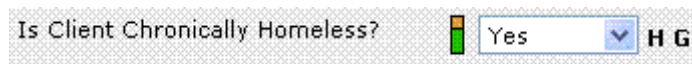


Figure 16

(Also see Line 2b on page 8 of this document.)

The following client fields have no effect on Line 6b of the *ServicePoint* HUD-40118 APR:

- ◆ Extent of Homelessness?
- ◆ Disabilities Sub-Assessment
- ◆ Type of Living Situation?

Note: The system does not cross-check information entered for the client with HUD’s definition of “Chronically Homeless.”

Line 7: Ethnicity

Line 7 calculates ethnicity for all participants who entered during the reporting period. (See Figure 17)

7. Ethnicity.	
a. Hispanic or Latino	0
b. Non-Hispanic or Non-Latino	31

Figure 17

The HUD-40118 APR pulls all participants with an entry date on the first day of or during the reporting period, and that have answered the **Ethnicity** question found in the **Additional Profile Information Assessment** and other assessments. (See Figure 18)

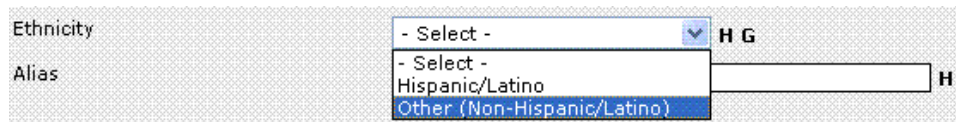


Figure 18

This line pulls from the pool of clients in 2b, columns 1 and 2. It includes all singles and adult clients in families, as identified by age, with a HUD entry date on or after the reporting period start date with or without a HUD exit date.

(Also see Line 2b on page 8 of this document.)

Line 8: Race

Line 8 calculates the total number of each **Race** identified for participants who entered during the reporting period. (See Figure 19)

8. Race.	
a. American Indian or Alaskan Native	4
b. Asian	0
c. Black or African American	2
d. Native Hawaiian or Other Pacific Islander	3
e. White	5
f. American Indian/Alaskan Native & White	0
g. Asian & White	0
h. Black/African American & White	2
i. American Indian/Alaskan Native & Black/African American	0
j. Other Multi-Racial	3
k. Other/Unknown (all that do not match)	12

Figure 19

This line pulls from the pool of clients in 2b, columns 1 and 2. It includes all singles and adult clients in families, as identified by age, with a HUD entry date on or after the reporting period start date with or without a HUD exit date.

Participants who entered a program on the first day of or during the reporting period, and who have selected the **Primary Race** (See Figure 20 ❶) either with or without a **Secondary Race** ❷ selected in the **Additional Profile Information Assessment** or other assessments, are pulled into the HUD-40118 APR race field.

Primary Race Picklist

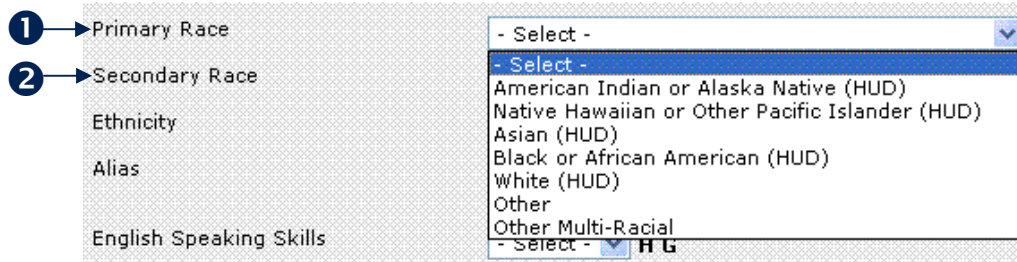


Figure 20

The choice for **Race** must be answered with an option that includes **(HUD)** in the options text. For example: **Black or African American (HUD)**. If a choice for race is not denoted by HUD text, the HUD-40118 APR will count the client in the **Other** race category. (Also see Line 2b on page 8 of this document.)

The manner in which Primary and Secondary race options are mapped to the HUD-40118 APR is displayed in Table 1:

Primary Race	Secondary Race	HUD-40118 APR
White (HUD)	-	White
Black or African-American(HUD)	-	Black or African American
Asian(HUD)	-	Asian
Native Hawaiian or Other Pacific Islander (HUD)	-	Native Hawaiian or Other Pacific Islander
American Indian or Alaska Native(HUD)	-	American Indian or Alaskan Native
American Indian or Alaska Native(HUD)	White(HUD)	American Indian/Alaskan Native & White
Asian(HUD)	White(HUD)	Asian & White
Black(HUD)	White(HUD)	Black/African American & White
American Indian or Alaska Native(HUD)	Black or African American(HUD)	American Indian/Alaskan Native & Black/African American
Other Multi-Racial (<i>Not in new standards</i>)	-	Other Multi-Racial

Table 1

Note: The report looks at the reverse combinations as well.

Line 9a: Special Needs

Line 9 calculates the total number of each disability identified for participants who entered during the reporting period. (See Figure 21)

9a. Special Needs.		
	All	Chronic
a. Mental illness	0	0
b. Alcohol abuse	1	0
c. Drug abuse	0	0
d. HIV/AIDS or related diseases	0	0
e. Developmental disability	0	0
f. Physical disability	0	0
g. Domestic violence	0	0
h. Other (please specify)	1	0
9b. Disabled.		
How many of the participants are disabled?		1

Figure 21

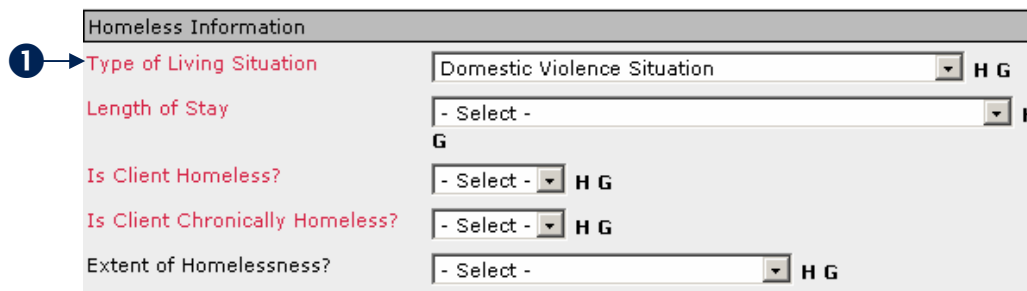
This line pulls from the pool of clients in 2b, columns 1 and 2. All answers for this question come from the disabilities sub-assessment except the domestic violence answer. The domestic violence answer comes from the following assessment question with associated response: “Type of Living Situation: Domestic Violence Situation (HUD 40118) or Domestic Violence Victim: Yes”

(Also see Line 2b on page 8 of this document.)

For a client to appear on lines 9a.a through 9a.f and also line 9a.h, the appropriate item in the **Disability Type** picklist within the disability sub-assessment must be selected.

For a client to appear on line 9a.g, one of the following HUD 40118 Assessment questions must be answered as follows:

1. **Type of Living Situation** must be answered as **Domestic Violence Situation**. (See Figure 22 ①)



The screenshot shows a form titled "Homeless Information". The first question, "Type of Living Situation", is highlighted with a red circle and an arrow. Its dropdown menu is set to "Domestic Violence Situation". Other questions include "Length of Stay", "Is Client Homeless?", "Is Client Chronically Homeless?", and "Extent of Homelessness?", each with a dropdown menu set to "- Select -".

Figure 22

2. **Domestic Violence Victim?** must have a **Yes** answer. (See Figure 23 ①).

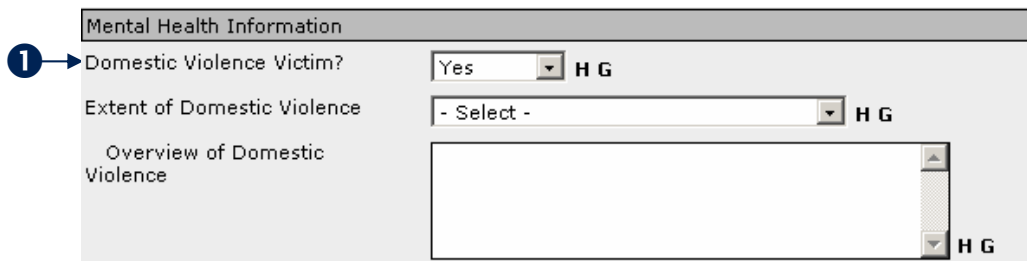


Figure 23

Line 9b: Disabled

A start date is required for the disability to be included in the HUD-40118 APR. (See Figure 24 ①)

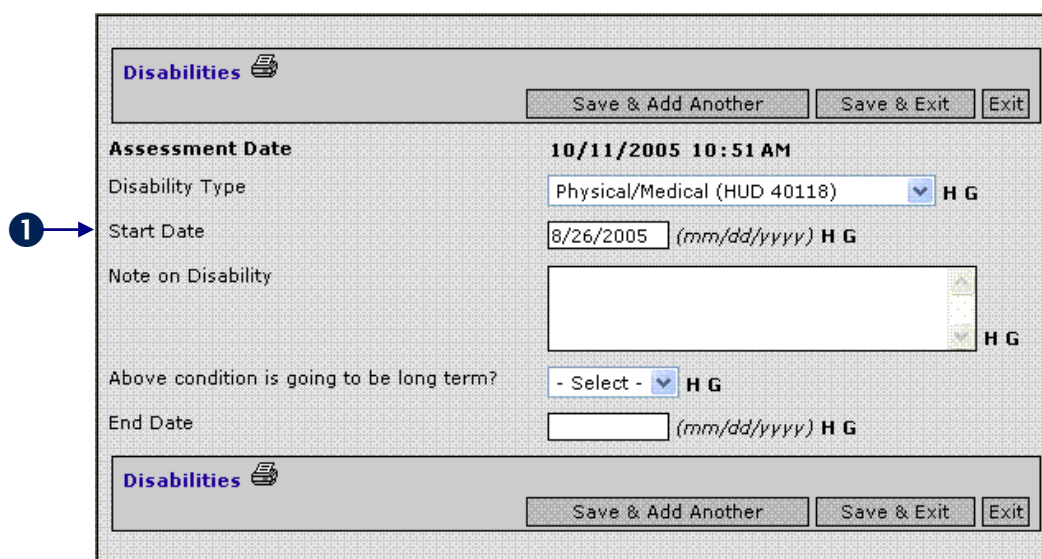


Figure 24

Note: If the actual start date is unknown, a date that is prior to the entry date should be entered. This will allow the user to determine that the disability did not begin while the client was receiving services from the provider.

The start date of the disability must be on or before the entry date.

An end date is *not* required for the information to be included in the HUD-40118 APR. However, if the end date of the disability is on or before the entry date, then the information will not be included in the report.

Line 10: Prior Living Situation

This line calculates the total number of each **Prior Living Situation** identified for participants who were entered during the reporting period. (See Figure 25)

10. Prior Living Situation.		
	All	Chronic
a. Non-housing (street, park, car, bus station, etc.)	2	2
b. Emergency shelter	0	0
c. Transitional housing for homeless persons	0	
d. Psychiatric facility	0	
e. Substance abuse treatment facility	0	
f. Hospital	0	
g. Jail/prison	0	
h. Domestic violence situation	0	
i. Living with relatives/friends	0	
j. Rental housing	3	
k. Other (please specify)	26	

Figure 25

This line pulls from the pool of clients in 2b, columns 1 and 2. It includes all singles and adult clients in families, as identified by age, with a HUD entry date on or after the reporting date with or without a HUD exit date.

Prior Living Situation reports on participants who entered a program during the reporting period and have selected a HUD answer from the **Prior Living Situation** picklist. This field is located on the HUD 40118 assessment and that must be answered with an option that includes **(HUD)** in the options text. For example: **Don't Know (HUD)**. (See Figure 26 ①)

Figure 26

(Also see Line 2b on page 8 of this document.)

Note: All non-HUD and Null answers will be counted in “Other (HUD).”

IMPORTANT

The choices for the type of **Prior Living Situation** are NOT identical to the **Prior Living Situation** fields on the HUD-40118 APR. This was a decision made by Bowman Systems with input from our clients. Table 2 identifies which answers correspond to the HUD-40118 APR fields. The left column identifies the terms that appear in the **Prior Living Situation** picklist. The right column identifies how the terms translate from the picklist to the HUD-40118 APR.

Prior Living Situation Option	HUD-40118 APR
Emergency Shelter (HUD)	Emergency shelter
Transitional Housing for Homeless (HUD)	Transitional housing for homeless persons
Substance Abuse Treatment Center (HUD)	Substance abuse treatment facility (HUD)
Psychiatric Hospital or Facility (HUD)	Psychiatric facility
Hospital (HUD)	Hospital
Living With Friends (HUD)	Living with relatives/friends
Living With Family (HUD)	Living with relatives/friends
Jail, Prison or Juvenile Facility (HUD)	Jail/prison
Place not meant for habitation (HUD)	Non-housing (street, park, car, bus station, etc.)
Owns House/Apartment (HUD)	Other
Rental House/Apartment (HUD)	Rental housing
Subsidized Housing	Other
Other (HUD)	Other (please specify)
Domestic Violence Situation (Non-HUD value as per new standards)	Domestic Violence Situation
Hotel/Motel without Emergency Shelter (HUD)	Other
Permanent Housing for Formerly Homeless (HUD)	Other
Foster care/group home (HUD)	Other
Don't Know (HUD)	Other
Refused (HUD)	Other

Table 2

Line 11: Monthly Income Information

Line 11 calculates the total for each listed income bracket for participants who exited during the reporting period. (See Figure 27)

11. Amount and Source of Monthly Income at Entry and Exit.				
Amount	A. Monthly Income at Entry		B. Monthly Income at Exit	
	All	Chronic	All	Chronic
a. No Income	11	2	10	2
b. \$1-150	0	0	0	0
c. \$151 - \$250	0	0	0	0
d. \$251 - \$500	2	1	3	1
e. \$501 - \$1000	0	0	0	0
f. \$1001 - \$1500	0	0	0	0
g. \$1501 - \$2000	0	0	0	0
h. \$2000 +	0	0	0	0
Source	C. Income Sources at Entry		D. Income Sources at Exit	
	All	Chronic	All	Chronic
a. Supplemental Security Income (SSI)	0	0	0	0
b. Social Security Disability Insurance (SSDI)	0	0	0	0
c. Social Security	0	0	0	0
d. General Public Assistance	0	0	0	0
e. Temporary Aid to Needy Families (TANF)	0	0	0	0
f. State Children's Health Insurance Program (SCHIP)	0	0	0	0
g. Veterans benefits	1	1	2	1
h. Employment Income	0	0	0	0
i. Unemployment Benefits	1	0	1	0
j. Veteran's Health Care	0	0	0	0
k. Medicaid	0	0	0	0
l. Food Stamps	0	0	0	0
m. Other (please specify)	0	0	0	0
n. No financial resources	11	2	10	2

Figure 27

This line pulls from the pool of clients in 2c, columns 1 and 2. If a client included in the report does not have a HUD exit date, he/she will not be included.

Only clients who exited a program during the reporting period are included in this section. Therefore, a HUD 40118 exit (See Figure 28 ❶) and the **Source of Income** (See Figure 29 ❶) must be entered before any of the monthly income information can be pulled into the HUD-40118 APR

(Also see Line 2c on page 9 of this document.)

Overview - HUD-40118				
Name	Entry Date	Exit Date	Reason Leaving	Destination
▶ Test, Chris	✎ 08/26/2005			
test, john	✎ 08/26/2005	✎		
test, sally	✎ 08/26/2005	✎		

1 → **Exit Data**

Exit Date: 08/25/2005 01 : 07 PM

Reason for Leaving: -Select-

If other, specify:

Destination: -Select-

If other, specify:

Tenure: -Select-

Subsidy: -Select-

Notes:

To update household members' exit data also, click on the box beside each name.

test, john

test, sally

Figure 28

Monthly Income at Entry

Both the **Source of Income** (See Figure 29 ①) and the **Start Date** ② fields must be populated for the monthly income information to be included in the HUD-40118 APR.

Monthly Income

Save & Add Another Save & Exit Exit

Assessment Date 08/25/2005 01:25 PM

Last 30 Day Income H G

1 → **Source of Income** - Select -

H G

Last 90 Day Income H G

2 → **Start Date** 08/26/2005 (mm/dd/yyyy) H G

3 → **End Date** (mm/dd/yyyy) H G

Monthly Income

Save & Add Another Save & Exit Exit

Figure 29

*Note: The system will add all entry income information that: 1) Has a **Start Date** ② on or before the HUD entry date; 2) Has an **End Date** ③ that is null or after the HUD entry date.*

If no information is recorded for this sub-assessment, a client with a HUD exit date that falls within the reporting period will be counted on line 11a (See Figure 30 ❶) in the **Amount** area and on line 11n ❷ in the **Source** area.

11. Amount and Source of Monthly Income at Entry and Exit.				
Amount	A. Monthly Income at Entry		B. Monthly Income at Exit	
	All	Chronic	All	Chronic
❶ → a. No Income	11	2	10	2
b. \$1-150	0	0	0	0
c. \$151 - \$250	0	0	0	0
d. \$251 - \$500	2	1	3	1
e. \$501 - \$1000	0	0	0	0
f. \$1001 - \$1500	0	0	0	0
g. \$1501 - \$2000	0	0	0	0
h. \$2000 +	0	0	0	0
Source	C. Income Sources at Entry		D. Income Sources at Exit	
	All	Chronic	All	Chronic
a. Supplemental Security Income (SSI)	0	0	0	0
b. Social Security Disability Insurance (SSDI)	0	0	0	0
c. Social Security	0	0	0	0
d. General Public Assistance	0	0	0	0
e. Temporary Aid to Needy Families (TANF)	0	0	0	0
f. State Children's Health Insurance Program (SCHIP)	0	0	0	0
g. Veterans benefits	1	1	2	1
h. Employment Income	0	0	0	0
i. Unemployment Benefits	1	0	1	0
j. Veteran's Health Care	0	0	0	0
k. Medicaid	0	0	0	0
l. Food Stamps	0	0	0	0
m. Other (please specify)	0	0	0	0
❷ → n. No financial resources	11	2	10	2

Figure 30

Monthly Income at Exit

If the **Last 30 Day Income** is different on exit than it was on entry, a new answer must be added to the monthly income sub-assessment: (See Figure 31 ❶)

Monthly Income		❶ → Add
Last 30 Day Income	Source of Income	
No Record Sets		
Show Entire List In Window		

Figure 31

Note: The system will add all exit income information that; 1) has a start date on or before the HUD exit date; 2) does not have an end date on or before the HUD exit date or has an end date that is null and; 3) monthly income added at exit does not require an end date to be pulled into the HUD-40118 APR.

- ◆ *Monthly Income at Entry:* The start date of the monthly income must be *on* or *before* the entry date.
- ◆ If the start date is after the entry date, but before or on the exit date, the information will be pulled into the income at exit. If the start date is after the exit date, the information will not be pulled into the HUD-40118 APR.
- ◆ *Monthly Income at Exit:* The start date of the monthly income must be *on* or *before* the exit date.

An end date is *not* required for the information to be included in the HUD-40118 APR. However, if there are end dates for the monthly income sub-assessments, they must satisfy the following conditions:

- ◆ *Monthly Income at Entry:* If the end date is after the entry date, the income data will be included in the report.
- ◆ *Monthly Income at Exit:* If the end date is after the exit date, the income data will be included in the report.

Income Mappings

Table 3 identifies which answers correspond to HUD-40118 APR fields. The left column identifies the terms that appear in the **Source of Income** picklist. The right column identifies how the terms transfer from the picklist to the HUD-40118 APR.

Note: To avoid including duplicate income values, the HUD report will only count distinct income sources and amounts.

Example: If a client has two different veterans benefit incomes listed with the exact same value, only one will be counted by the report. However, if a client has two different veterans benefit incomes listed with different values, both incomes will be counted by the report.

SP Income Source Values	HUD-40118 APR
Medicare (HUD)	Other
Child Support (HUD)	Other
Earned Income (HUD)	Employment Income
Self Employment Wages (non-HUD)	Employment Income
Food Stamps (HUD)	Food Stamps
General Assistance (GA)	General Public Assistance
Retirement Income from Social Security (HUD)	Social Security
TANF (HUD)	Temporary Aid to Needy Families (TANF)
Unemployment Insurance (HUD)	Unemployment Benefits
A Veteran Disability Payment (HUD)	Veterans benefits
Other Source (HUD)	Other
Medicaid (HUD)	Medicaid
SSI (HUD)	Supplemental Security Income (SSI)
SSDI (HUD)	Social Security Disability Insurance (SSDI)
SCHIP (HUD)	State Children's Health Insurance Program (SCHIP)
Veteran's Administration (VA) Medical Services	Veteran's Health Care
Private Disability Insurance (HUD)	Other
Worker's Compensation (HUD)	Other
Veteran's Pension (HUD)	Veterans benefits
Pension From a Former Job (HUD)	Employment Income
Alimony or Other Spousal Support (HUD)	Other
No Financial Resources (HUD)	No Financial Resources
Special Supplemental Nutrition Program for WIC (HUD)	Other
TANF Child Care Services (HUD)	Temporary Aid to Needy Families (TANF)
TANF Transportation Services (HUD)	Temporary Aid to Needy Families (TANF)
Other TANF-Funded Services (HUD)	Temporary Aid to Needy Families (TANF)
Section 8, Public Housing or rental assistance (HUD)	Other
No Financial Resources (HUD) with NO dollar amount entered	No Financial Resources
No Financial Resources (HUD) WITH a dollar amount entered	Other
Customer created fields with a dollar amount entered	Other
Customer created fields with no dollar amount entered	No financial resources

Table 3

Line 12: Length of Stay in Program

Line 12 of the HUD-40118 APR documents participants that have an entry date before, on, or during the reporting period, and have an exit date that falls during the reporting period. This section pulls from the client's entry and exit dates.

This line pulls from the pool of clients in 2c, columns 1 and 2. If a client included in the report does not have a HUD exit date, he/she will not be included. Lines 12a through 12i are based on month ranges. Question 12j counts 10 years plus 1 to 31 days as over 10 years rather than rounding the months down to 8-10 years.

(Also see Line 2c on page 9 of this document.)

Line 12a: Participants who left during Reporting Period

If the answer to the question **Is client chronically homeless?** is *no* or *null*, then the client will be included in the **All** column. (See Figure 32 ❶)

12a. Length of Stay in Program. (Participants who left during operating year)		
	❶ All	❷ Chronic
a. Less than 1 month	5	1
b. 1 to 2 months	1	0
c. 3 - 6 months	5	2
d. 7 months - 12 months	1	0
e. 13 months - 24 months	0	0
f. 25 months - 3 years	1	0
g. 4 years - 5 years	0	0
h. 6 years - 7 years	0	0
i. 8 years - 10 years	0	0
j. over 10 years	0	0

Figure 32

If the client answered *yes* to the question **Is client chronically homeless?**, they will be included in both the **All** ❶ and the **Chronic** ❷ columns.

Line 12b: Participants who did not leave during Reporting Period

Line 12b of the HUD-40118 APR documents participants that have a valid entry date and either do not have an exit date or have an exit date that is after the last day of the reporting period.

If the answer is *no* or *null* for the question **Is client chronically homeless?**, the client will be included in the **All** column. (See Figure 33 ❶)

12b. Length of Stay in Program. (Participants who did not leave during operating year)		
	All 1	Chronic 2
a. Less than 1 month	2	1
b. 1 to 2 months	2	2
c. 3 - 6 months	15	3
d. 7 months - 12 months	16	4
e. 13 months - 24 months	13	3
f. 25 months - 3 years	28	0
g. 4 years - 5 years	0	0
h. 6 years - 7 years	0	0
i. 8 years - 10 years	0	0
j. over 10 years	0	0

Figure 33

If the client answered *yes* to the question **Is client chronically homeless?**, they will be included in both the **All 1** and the **Chronic 2** columns.

Line 13: Reasons for Leaving

Line 13 of the HUD-40118 APR applies to participants with an exit date during the reporting period. Data for this section is pulled from the **Reason for Leaving** field located on the client’s exit screen. (See Figure 34 **1**)

Figure 34

This line pulls from the pool of clients in 2c, columns 1 and 2. If a client included in the report does not have a HUD exit date, he/she will not be included.

(Also see Line 2c on page 9 of this document.)

If the answer is *no* or *null* for the question **Is client chronically homeless?**, the client will be included in the **All** column. (See Figure 35 **1**)

13. Reasons for Leaving.		
	All 1	Chronic 2
a. Left for a housing opportunity before completing program	1	0
b. Completed program	4	0
c. Non-payment of rent/occupancy charge	0	0
d. Non-compliance with project	1	0
e. Criminal activity / destruction of property / violence	1	1
f. Reached maximum time allowed in project	0	0
g. Needs could not be met by project	2	1
h. Disagreement with rules/persons	3	1
i. Death	0	0
j. Other (please specify)	1	0
k. Unknown/disappeared	0	0

Figure 35

If the client answered *yes* to the question **Is client chronically homeless?**, they will be included in both the **All** **1** and the **Chronic** **2** columns.

Line 14: Destination

Line 14 of the HUD-40118 APR applies to participants with an exit date during the reporting period. Data for this section is pulled from the **Destination** (See Figure 36 **1**), **Tenure** **2**, and **Subsidy** **3** fields located on the client's exit screen.

Overview - HUD-40118

Name	Entry Date	Exit Date	Reason Leaving	Destination
▶ Test, James	05/27/2005	07/11/2005	Completed program	Rental room/house/apartment

Exit Data

Exit Date: 07/11/2005 05 : 35 PM

Reason for Leaving: Completed program

If other, specify:

1 → Destination: Rental room/house/apartment

If other, specify:

2 → Tenure: -Select-

3 → Subsidy: -Select-

Notes:

To update household members' exit data also, click on the box beside each name.
No Household members are included in this Entry/Exit.

Figure 36

This line pulls from the pool of clients in 2c, columns 1 and 2. If a client included in the report does not have a HUD exit date, he/she will not be included.

(Also see Line 2c on page 9 of this document.)

If the answer is *no* or *null* for the question **Is client chronically homeless?**, the client will be included in the **All** column. (See Figure 37 ①)

14. Destination.		①	②
		All	Chronic
PERMANENT (a - h)	a. Rental house or apartment (no subsidy)	2	1
	b. Public Housing	2	0
	c. Section 8	0	0
	d. Shelter Plus Care	0	0
	e. HOME subsidized house or apartment	0	0
	f. Other subsidized house or apartment	0	0
	g. Homeownership	0	0
	h. Moved in with family or friends	0	0
TRANSITIONAL (i - j)	i. Transitional housing for homeless persons	1	0
	j. Moved in with family or friends	0	0
INSTITUTION (k - m)	k. Psychiatric hospital	1	0
	l. Inpatient alcohol/drug treatment facility	0	0
	m. Jail/prison	0	0
EMERGENCY SHELTER (n)	n. Emergency shelter	4	1
OTHER (o - q)	o. Other supportive housing	0	0
	p. Places not meant for human habitation (e.g. street)	0	0
	q. Other (please specify)	3	1
UNKNOWN	r. Unknown	0	0

Figure 37

If the client answered *yes* to the question **Is client chronically homeless?**, they will be included in both the **All** ① and the **Chronic** ② columns.

Please view Table 4 below for mapping possibilities for the HUD-40118 APR.

Destination (1-17)	Subsidy (0-6,8,9)	Tenure (1,2,8,9)	APR (a-r)
1	All	All	N
2	All	All	I
3	3	All	D
3	Not 3	All	F
4	All	All	K
5	All	All	L
6	All	All	Q
7	All	All	M
8	0	All	R
8	1	All	B
8	2	All	C
8	3	All	D
8	4	All	E
8	5	1	F
8	5	2 or NULL	O
8	5	8,9	R
8	6-9 or NULL	All	R
9	0	All	R
9	1	All	B
9	2	All	C
9	3	All	D
9	4	All	E
9	5	1	F
9	5	2 or NULL	O
9	5	8,9	R
9	6-9 or NULL	All	R
10	0 or NULL	All	A
10	1	All	B
10	2	All	C
10	3	All	D
10	4	All	E
10	5	1	F
10	5	2 or NULL	O
10	5	8,9	R
10	6	All	F
10	8,9	All	R
11	All	All	G
12	All	1	H
12	All	Not 1	J
13	All	1	H
13	All	Not 1	J
14	All	All	Q
15	All	All	Q
16	All	All	P
17	0	All	Q
17	1	All	B
17	2	All	C
17	3	All	D
17	4	All	E
17	5	1	F
17	5	2 or NULL	O
17	5	8,9	R
17	6 or NULL	All	Q
17	8,9	All	R

Table 4

Please see **Table 4 Key** below for identification of elements displayed in Table 4.

Key to Table 4

DESTINATIONS	
1	Emergency shelter (including a youth shelter, or hotel, motel, or campground paid for with emergency shelter
2	Transitional housing for homeless persons (including homeless youth)*
3	Permanent housing for formerly homeless persons (such as SHP, S+C, or SRO Mod Rehab)
4	Psychiatric hospital or other psychiatric facility
5	Substance abuse treatment facility or detoxification center
6	Hospital (non-psychiatric)
7	Jail, prison or juvenile detention facility
8	Don't Know
9	Refused
10	Room, apartment, or house that you rent
11	Apartment or house that you own
12	Staying or living in a family member's room, apartment, or house
13	Staying or living in a friend's room, apartment, or house
14	Hotel or motel paid for without emergency shelter voucher
15	Foster care home or foster care group home
16	Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or
17	Other
SUBSIDY TYPES	
0	None
1	Public housing
2	Section 8
3	S+C
4	HOME program
5	HOPWA program
6	Other housing subsidy
8	Don't Know
9	Refused
TENURES	
1	Permanent
2	Transitional
8	Don't Know
9	Refused
A.P.R. CATEGORIES	
A	Rental house or Apartment (no subsidy)
B	Public housing
C	Section 8
D	Shelter Plus Care (S+C)
E	HOME subsidized house or apartment
F	Permanent other subsidized house or apartment
G	Homeownership
H	Permanent: moved in with family or friends
I	Transitional housing for homeless persons
J	Transitional: moved in with family or friends
K	Institution psychiatric hospital
L	Institution inpatient alcohol or other drug treatment facility
M	Institution jail/prison
N	Emergency Shelter
O	Other supportive housing
P	Other places not meant for human habitation (e.g., street)
Q	Other (specify)
R	Unknown

Line 15: Supportive Services

Line 15 of the HUD-40118 APR applies to participants that were provided a service and have an exit date during the reporting period. (See Figure 38)

15. Supportive Services.				
NOTE: The below services were given to participants who left during the operating year. Add the following counts into the appropriate category for question 15.				
	Service	Service Code	All	Chronic
1.	Homeless Shelter	BH-180.850	<u>1</u>	0
2.	Local Transportation	BT-450	<u>2</u>	0
3.	Education	H	<u>2</u>	<u>1</u>
4.	Rehabilitation/Habilitative Services	LR	<u>2</u>	<u>1</u>

Figure 38

This area of the HUD-40118 APR pulls information from the client's **Services Provided for Need Identified** record located under **Service Transactions**. (See Figure 39)

Services Provided for Need Identified					Add Service
	Provider	Start Date	End Date	Provider-specific Service	Referred By
	 Bowman Systems	08/25/2005	08/27/2005		

Figure 39

This line pulls from the pool of clients in 2c, columns 1 and 2. If a client included in the report does not have a HUD exit date, he/she will not be included. Counts based on distinct clients and types of services instead of a straight service count showing the number of persons who received each service. User will “map” the services provided to appropriate HUD items.

(Also see Line 2c on page 9 of this document.)

Note: The service start and end dates must overlap the client's entry and exit dates to be included in the report. A service with only a start date will be compared to see if it falls within or on the client's entry and exit dates.

NULL DATA

Show Null Data is a feature that allows the user to run a query to find potential missing data. Since the *HUD 40118 report* is based on different pools of clients (those who entered prior to the first day of the operating year, those who entered during the operating year, and those who left during the operating year), the selections for the null data reporting feature are set up based on a client pool and a data element.

For example, the selection **Entered During: Date of Birth** finds clients who are part of the question 2b client pool and have no date of birth specified.

If the *null data query* finds clients with no values for the specified selection, a list of those clients will display. The user clicks on the name of the client to pull up their entry/exit records (or the specified profile assessment, depending on the type of data the user is querying) and edits the appropriate field as needed. The user can move down the line, clicking each client's name, and editing his or her data. Once the user has edited the last client, he or she clicks the **Show Null Data** button again for this data selection. The resulting list of clients should be less or none.

Note: For “First Day” and “Entered During” selections, edit the client's entry data. For “Left During” selections, the user edits the client's exit data.

After the first data selection is “cleaned up”, the user repeats the process for the next data selection from the list. The user should check for null data on a regular basis to ensure there are no surprises when the report is due.

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