

CT HMIS Reports Manual

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The foundational infrastructure of modern human services relies upon the systematic collection, rigorous analysis, and real-time reporting of client data. Within the State of Connecticut, the Homeless Management Information System (CT HMIS) operates as the central data lakehouse and operational nexus for a vast network of Continuum of Care (CoC) agencies, emergency shelters, street outreach initiatives, and behavioral health providers.¹ Powered by the CaseWorthy platform, this ecosystem integrates client tracking protocols, automated workflows, and SQL Server Reporting Services (SSRS) to deliver a highly dynamic, multi-tiered reporting environment.³ CaseWorthy's architecture enables the unification of disparate data streams, transitioning human services away from siloed spreadsheets and toward coordinated, whole-person care.¹

The exhaustive library of reports within CT HMIS is systematically categorized to serve distinct systemic functions. These functions range from satisfying stringent federal compliance mandates and tracking system-wide performance, to facilitating micro-level case management and proactive data quality assurance.⁴ The deployment of these reporting tools ensures that agencies maintain adherence to the rigorously updated data standards mandated by the U.S. Department of Housing and Urban Development (HUD), while simultaneously enabling macro-level strategic planning necessary to achieve functional zero for homelessness.⁶

This comprehensive analysis delineates the specific functionality, intended usage, and strategic value of the CT HMIS report library. By examining the structural hierarchy of these reports—spanning federal compliance, state departmental mandates, data quality monitoring, Coordinated Access Networks (CAN), daily operational workflows, interactive visual dashboards, and archived historical data—this document provides a definitive architectural map of the system's reporting capabilities.

Federal Compliance and System Performance Measurement

The primary fiscal and operational mandate of the CT HMIS implementation is satisfying the complex, continuously evolving reporting requirements dictated by federal funding sources. HUD, operating in collaboration with partner agencies such as the U.S. Department of Health and Human Services (HHS) and the U.S. Department of Veterans Affairs (VA), issues comprehensive Data Standards that dictate the precise data elements, logic, and export formats required for federal compliance.⁶ The CT HMIS Compliance Reports dashboard isolates these high-stakes exports, ensuring that participating agencies can generate validation-ready files for federal data repositories, most notably the SAGE HMIS portal.⁶

The transition to the FY 2026 HUD Data Standards required significant updates to the

underlying logic of these reports, incorporating revised mapping instructions, updated CSV specifications, and an interactive technical framework. ⁶ Compliance reporting is divided into system-wide aggregates and organizational-level variants (designated by the "Org" suffix). The organizational reports restrict data visibility to the specific agency executing the report, serving as vital tools for internal auditing prior to system-wide aggregation. ¹⁰

HMIS and HUD Primary Compliance Reports

HUD reporting protocols revolve around programmatic milestones, annual fiscal reviews, and longitudinal system evaluations. These tools measure the efficacy of interventions ranging from rapid re-housing to permanent supportive housing.

Section	Report Name	Form ID	Description and Intended Usage
HMIS / HUD Compliance	APR FY 2026 v. 1.0	16789	The Annual Performance Report (APR) is utilized by Continuum of Care (CoC) funded projects to report client demographics, financial changes, and housing outcomes to HUD. ¹⁰
HMIS / HUD Compliance	APR FY2026 v. 1.0 (Org)	1000002028	The organizational variant of the APR, allowing individual agencies to review their specific CoC project performance internally prior to federal submission. ¹⁰

HMIS / HUD Compliance	CAPER FY 2026 v. 1.0	16790	The Consolidated Annual Performance and Evaluation Report (CAPER), utilized primarily by Emergency Solutions Grant (ESG) recipients to document project accomplishments. ¹⁰
HMIS / HUD Compliance	CAPER FY 2026 v. 1.0 (Org)	1000002029	The organizational variant of the ESG CAPER, restricted to the executing agency's specific client data. ¹⁰
HMIS / HUD Compliance	HUD System Performance Measures (2026) v1	16786	Calculates critical system-wide metrics across seven standardized measures to evaluate the overall efficacy of a CoC in ending homelessness. ⁶
HMIS / HUD Compliance	Coordinated Entry APR FY 2026 v 1.0	16787	Evaluates the operational performance of Coordinated Entry (CE) systems, tracking assessment volume, prioritization efficiency, and

			housing placement rates. ¹⁰
HMIS / HUD Compliance	Coordinated Entry APR FY 2026 v. 1.0 (Org)	1000002025	The organizational variant of the CE APR, used by specific Coordinated Access Networks to monitor local intake efficiency. ¹⁰
HMIS / HUD Compliance	HMIS CSV Export 2026	16750	Generates raw, unaggregated data exports formatted strictly to HUD CSV specifications for external ingestion, auditing, or integration with federal repositories. ¹⁰
HMIS / HUD Compliance	HUD CSV Export 2026 (Org)	1000002024	The organizational variant of the raw CSV export, allowing agencies to extract their own compliant data for external analysis. ¹⁰
HMIS / HUD Compliance	LSA Inventory Export	1000001672	The Longitudinal System Analysis (LSA) export. Tracks system inventory, bed utilization rates, and client pathways over a full 12-month period for submission to

			HUD's HDX 2.0. ¹⁰
HMIS / HUD Compliance	LSA	12801	The primary system-wide interface for Longitudinal System Analysis reporting, replacing older reporting frameworks like the AHAR. ¹⁰
HMIS / HUD Compliance	AHAR	587	The legacy Annual Homeless Assessment Report format, maintained for historical context and auditing of pre -LSA reporting periods. ¹⁰
HMIS / HUD Compliance	PIT Report Summary	1303	Aggregates data for the Point-in-Time (PIT) count, a federally mandated census of sheltered and unsheltered individuals experiencing homelessness on a single night. ¹⁰
HMIS / HUD Compliance	PIT- Fall 2018	13127	A historical snapshot of the Point-in-Time count for the Fall 2018 reporting period, used for long-term trend analysis. ¹⁰

HMIS / HUD Compliance	PIT- Fall 2018 (Org)	1000001868	The organizational variant of the historical 2018 PIT count. ¹⁰
HMIS / HUD Compliance	ESG Performance Report	1000000724	Details specific performance metrics for programs funded by the Emergency Solutions Grant, closely mirroring CAPER logic but tailored for state - level review. ¹⁰
HMIS / HUD Compliance	ESG Performance Report (Org)	1000001818	The organizational variant of the ESG Performance Report. ¹⁰
HMIS / HUD Compliance	HUD RHY Data	5585	A dedicated compliance export for Runaway and Homeless Youth (RHY) programs, capturing youth - specific vulnerabilities, family reunification metrics, and housing outcomes. ¹⁰
HMIS / HUD Compliance	HPRP	271	Legacy reporting for the Homelessness Prevention and Rapid Re-Housing Program, utilized to

			audit historical pandemic or stimulus-era funding streams. ¹⁰
HMIS / HUD Compliance	HPRP (Org)	1000001821	The organizational variant of the HPRP historical report. ¹⁰
HMIS / HUD Compliance	CoC APR	12799	An aggregated Continuum of Care Annual Performance Report, generally run at the system level to combine multiple project outputs. ¹⁰
HMIS / HUD Compliance	CoC APR (Org)	1000001159	The organizational variant of the aggregated CoC APR. ¹⁰
HMIS / HUD Compliance	HUD CoC APR (Org)	1000000166	A specific organizational iteration of the CoC APR required for certain legacy programmatic reviews. ¹⁰

The System Performance Measures (SPM) report (Form ID 16786) stands out as the most critical barometer of macroscopic system health within the CT HMIS ecosystem. Continuums of Care are required to generate this data based strictly on HUD's HMIS Programming Specifications, utilizing complex algorithms to track client cohorts over multiple years. ⁶ The SPM report aggregates data across seven highly specific, federally standardized measures. The first measure, Length of Time Persons Remain Homeless, tracks the average and median duration clients spend engaged with the system. Metric 1a calculates this duration strictly using client start, exit, and bed night dates within Emergency Shelter (ES) and Safe Haven (SH) projects. Metric 1b expands this universe to include data from the client's "Living Situation"

assessments, incorporating the time spent waiting for housing move -in.⁶

The second measure evaluates Returns to Homelessness, acting as a critical metric for systemic recidivism. This measure isolates clients who exited the system to a permanent housing destination two years prior to the report date range, tracking precisely how many of those clients subsequently returned to homelessness within 6, 12, and 24-month intervals.⁶ The third measure tracks the absolute Number of Homeless Persons, comparing Point-in-Time counts against annual HMIS enrollment counts to evaluate overall population trends. The fourth measure tracks Employment and Income Growth, separating clients into "stayers" (those remaining in CoC-funded projects) and "leavers" (those who have exited), and measuring quantitative increases in earned and non-employment cash income.⁶

The fifth measure identifies the Number of Persons who Become Homeless for the First Time by isolating individuals entering ES, SH, and TH projects with absolutely no prior enrollments in the CT HMIS database within the preceding 24 months.⁶ The sixth measure is highly specialized, monitoring Homelessness Prevention and Housing Placement specifically for individuals defined under Category 3 of HUD's homelessness definition (typically unaccompanied youth and families with children experiencing severe instability). Finally, the seventh measure quantifies Successful Placement and Retention of Permanent Housing, calculating the percentage of clients who successfully transition from street outreach to housing, or who successfully retain their permanent supportive housing placements over time.⁶

Block Grants and Federal Assistance Programs

Beyond HUD's specific homelessness interventions, human services organizations functioning within the CT HMIS network frequently act as Community Action Agencies (CAAs), managing funding streams from various federal block grants. These grants require entirely distinct reporting frameworks to demonstrate that funds are being allocated efficiently to eligible, low-income households for crisis intervention and poverty reduction.

Dashboard Section	Report Name	Form ID	Description and Intended Usage
Block Grants	CEAP	843	Comprehensive Energy Assistance Program compliance reporting. Verifies

			household income eligibility and documents energy burden mitigation interventions. ¹⁰
Block Grants	CEAP (Org)	1000000170	The organizational variant of the CEAP report, allowing agencies to audit their specific utility assistance disbursements. ¹⁰
Block Grants	CBSG / CSBG	467	The standard Community Services Block Grant tracking report. ¹⁰
Block Grants	CSBG (Org)	1000001805	The organizational variant for CSBG tracking, aligning local agency interventions with federal poverty reduction frameworks. ¹⁰
Block Grants	CSBG 4.A	15246	A granular CSBG reporting module that specifically breaks down employment and income management domains. ¹⁰
Block Grants	CSBG 4.B	15247	A granular CSBG reporting module

			focused on education and cognitive development domains. ¹⁰
Block Grants	CSBG 4.C	14644	A granular CSBG reporting module analyzing housing and infrastructure domains. ¹⁰
Block Grants	CSBG 4.C Prior Year	12798	A historical comparison report for the CSBG 4.C domain, used to demonstrate year - over - year improvements in housing stability. ¹⁰
Block Grants	LIHEAP/WAP	1465	Low Income Home Energy Assistance Program and Weatherization Assistance Program reporting. Details financial crisis intervention and structural utility stabilization. ¹⁰
Block Grants	LIHEAP/WAP (Org)	1000001806	The organizational variant of the LIHEAP/WAP compliance report. ¹⁰
Block Grants	ROMA	641	Translates raw service delivery

			data into the Results-Oriented Management and Accountability (ROMA) national standard metrics, focusing on family, agency, and community -level outcomes. ¹⁰
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These reports are essential for agencies managing blended funding streams. By utilizing the centralized CaseWorthy platform, organizations can simultaneously track a client’s housing status for HUD while tracking their energy and utility assistance for LIHEAP. This architecture prevents the need for duplicative data entry across siloed software systems, reducing the administrative burden on case workers and ensuring that holistic, whole -person care is accurately documented across all federal domains. ¹

State -Level Mandates and Departmental Reporting

In addition to federal frameworks, CT HMIS is heavily customized to meet the specific legislative and administrative mandates of Connecticut’s state departments. The Department of Housing (DOH), the Department of Mental Health and Addiction Services (DMHAS), and the Office of Early Childhood (OEC) each require bespoke reporting outputs to monitor their respective state -funded initiatives.

DMHAS, DDaP, and Behavioral Health Integration

The intersection of chronic homelessness, severe mental illness, and substance use disorders requires specialized clinical case management and rigorous reporting. CT HMIS facilitates this through specific modules designed for DMHAS, ensuring that behavioral health interventions are seamlessly integrated with housing data. ²

Dashboard Section	Report Name	Form ID	Description and Intended Usage
DMHAS	Acuity Index Report	1000001616	Tracks the severity of client vulnerabilities,

			behavioral health indicators, and substance use over time to evaluate the efficacy of clinical interventions. ¹⁰
DMHAS	Acuity Index Report (Org)	1000001622	The organizational variant of the Acuity Index Report, used by specific behavioral health providers to monitor their clinical caseload. ¹⁰
DMHAS	DMHAS / DDAP Export 2025	1000001986	A standardized, complex data extract designed to bridge CT HMIS data with the state's Data Download and Analysis Portal (DDaP) for rigorous behavioral health oversight. ¹⁰
DMHAS	DMHAS / DDAP Export 2025 (Org)	1000002000	The organizational variant of the DDaP export, allowing agencies to submit their state-funded behavioral health data accurately. ¹⁰
Other Reports	DMHAS / DDAP Evaluation Report	1000001921	Provides a funder-level programmatic evaluation view to assess outcome

			achievements and compliance across all DMHAS-funded initiatives. ¹⁴
HMIS / HUD	PATH FY 2026 v. 1.0	16788	Projects for Assistance in Transition from Homelessness (PATH) reporting. Evaluates outreach efforts specifically targeting individuals with serious mental illnesses experiencing unsheltered homelessness. ¹⁰
HMIS / HUD	PATH FY 2026 v.1.0 (Org)	1000002027	The organizational variant of the PATH report, used by local outreach teams for state monitoring and compliance. ¹⁰
HMIS / HUD	PATH BNL Crosswalk v2	1000001551	Correlates clients engaged by PATH street outreach teams with the Coordinated Access By Name List (BNL) to ensure highly vulnerable individuals are prioritized for housing. ¹⁰

HMIS / HUD	PATH BNL Crosswalk v2 (Org)	1000001555	The organizational variant of the PATH to BNL Crosswalk. ¹⁰
DMHAS	H2H Report V4	<i>No ID listed</i>	Reports on the Homeless to Housing (H2H) initiative, tracking clients from street outreach into permanent supportive environments. ¹⁰
Other Reports	H2H Report (Testing_TM)	1000001786	A testing environment variant of the H2H report used for logic validation before systemic deployment. ¹⁰
HMIS / HUD	ddap	1000000669	A legacy or generalized DDaP data verification report used for cross-system alignment. ¹⁰
HMIS / HUD	ddap (Org)	1000001740	The organizational variant of the generalized DDaP report. ¹⁰

The PATH Program HMIS Manual outlines that PATH participation in HMIS is not merely an administrative exercise for compliance; it is fundamentally designed to facilitate acute care coordination and generate the PATH Annual Report, providing direct benefits to clients facing severe psychological distress.¹⁶ The CaseWorthy system frequently updates its logic for DMHAS/DDaP programs to ensure seamless integration. Recent system enhancements include refining ICD-10 Diagnosis Code mappings to ensure clinical accuracy, updating specific

"Duration of Service" calculations during data exports, and adding "Health Care Service" options directly to Homeless to Housing (H2H) projects within the user interface.¹⁵

Department of Housing (DOH) and Specialized Services

The Connecticut Department of Housing oversees a significant portion of the state's emergency shelter infrastructure and rapid re-housing programs. This oversight necessitates rigorous utilization reporting to justify continued funding, identify systemic bottlenecks, and ensure equitable resource distribution.

Dashboard Section	Report Name	Form ID	Description and Intended Usage
DOH	DOH Shelter Utilization v2 (2026)	1000000666	Analyzes the capacity, nightly occupancy rates, and turnover of emergency shelters. It verifies that funded beds are being optimally utilized based on daily bedlist check-ins. ¹⁰
DOH	DOH Shelter Utilization v2 (2026) (Org)	1000001812	The organizational variant of the Shelter Utilization report, utilized by shelter managers to audit their internal bedlist data. ¹⁰
OEC Reports	OEC Report - Annual	1000001315	Tracks interventions related to early childhood development,

			family stability, and housing outcomes for vulnerable young families on an annual basis. ¹⁰
OEC Reports	OEC Report - Quarterly	1000001317	A quarterly snapshot of OEC interventions, utilized for agile program adjustments and state-level progress tracking. ¹⁰
Secure Jobs	Secure Jobs v2	1000001273	Reports on the Secure Jobs CT pilot, analyzing the statistical correlation between stable housing, workforce training, and increased household income. ¹⁰
Secure Jobs	Secure Jobs v2 (Org)	1000001276	The organizational variant of the Secure Jobs report, used by local agencies administering the employment pilot. ¹⁰
Food Pantry	Food Pantry	1000000410	Tracks individual and household utilization of state -

			affiliated food pantries to measure nutritional assistance volume. ¹⁰
Food Pantry	Food Pantry (Org)	1000001813	The organizational variant of the Food Pantry report, used for local inventory and demand forecasting. ¹⁰
Food Pantry	Food Pantry Cross-Utilization	1000000411	Identifies households utilizing multiple food pantries across the network, allowing agencies to detect severe food insecurity and coordinate broader wraparound assistance. ¹⁰
Food Pantry	Food Pantry Cross-Utilization (Org)	1000001814	The organizational variant of the Cross-Utilization report. ¹⁰

The DOH Shelter Utilization Report (SUR) relies heavily on the accurate and timely administration of the CaseWorthy "Bedlist" function. If shelter staff fail to log nightly check-ins accurately, the facility's utilization rate artificially drops in the report, which can trigger severe funding audits and penalize the agency.¹⁷ Recent updates to the SUR have integrated nuanced HUD Universal Data Elements (UDE) and Program Specific Data Elements (PSDE), such as accurately tracking complex financial arrangements like rentals supplemented by Housing Choice Vouchers (HCV).²⁰

The Secure Jobs CT pilot represents a highly specialized intervention requiring bespoke reporting. The program is a demonstration pilot designed to increase the income of families transitioning from homelessness to housing by connecting them with necessary education and

training. The Secure Jobs v2 reports track enrollment statuses, employment placements, and long-term income stabilization, providing empirical data to justify the program's methodology. ¹⁸

Coordinated Access Networks (CAN) and Dynamic Prioritization

The transition in human services from a fragmented, "first -come, first -served" model to a unified Coordinated Entry System (CES) represents a profound paradigm shift. CaseWorthy supports this statewide mandate through the Coordinated Access Networks (CAN), relying on dynamic, real-time reports to assess vulnerability, manage waitlists, and triage the most critically at-risk individuals for immediate housing placement. ¹³

The By Name List (BNL)

The crown jewel of the Coordinated Access ecosystem is the By Name List (BNL). Unlike static compliance reports that look backward at historical data, the BNL is a real-time, dynamic registry that continuously updates based on daily enrollment and service data within CT HMIS. It tracks every known individual experiencing literal homelessness within the jurisdiction, functioning as the primary operational tool for CAN housing prioritization. ²²

Dashboard Section	Report Name	Form ID	Description and Intended Usage
CT HMIS- General	By Name List (BNL) v2.17	1000002040	The definitive, real-time registry of all literally homeless households. Extensively utilized in weekly CAN case conferencing to prioritize housing vouchers and Permanent Supportive Housing (PSH) beds. ¹⁰
CT HMIS- General	By Name List (BNL)	1000002041	A Quality

	v2.17- QA		Assurance variant of the active BNL, used by system administrators to test algorithmic logic against live data without disrupting operational CAN meetings. ¹⁰
HMIS / HUD	By Name List	11822	A generalized or legacy system-wide extraction of the By Name List for high-level compliance overviews. ¹⁰
HMIS / HUD	By Name List (Org)	1000001816	An organizational extraction of the BNL, allowing specific agencies to view only the homeless clients assigned to their programs. ¹⁰
Other Reports	By Name List (BNL) v2.4	1000001464	An older, highly specific iteration of the BNL logic retained for specific historical reporting functionality or ongoing testing. ¹⁰
Other Reports	By Name List (BNL) v2.4 (Org)	1000001804	The organizational variant of the BNL v2.4. ¹⁰

Other Reports	BNL History Form	1000001726	Extracts the historical trajectory of a client's presence on the BNL, tracking how long they have been waiting for housing and identifying systemic delays. ¹⁰
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The programmatic logic governing the BNL v2.17 is extraordinarily complex and subject to continuous refinement. To meet the inclusion criteria, an individual must be classified as "literally homeless" or fleeing domestic violence, and must possess a current or recent (within the last 90 days) enrollment in specific program types, including Emergency Shelter, Transitional Housing, Street Outreach, or Safe Haven programs.¹³ Recent system updates explicitly expanded this logic to include clients currently enrolled in Safe Haven projects, and refined the criteria to ensure that only qualifying DMHAS/DDaP H2H Street Outreach enrollments are included based on the client's most recent "Current Living Situation" assessment.¹⁵

Because the BNL dictates housing prioritization, its accuracy is a literal matter of life and death for vulnerable clients. However, the system must acknowledge inherent data gaps. The BNL explicitly excludes individuals with verified homelessness who have refused to sign an HMIS Release of Information (ROI), individuals who have not yet had their homelessness verified due to staffing constraints, and unsheltered individuals who have not engaged with the system in any capacity.¹³ To mitigate these gaps, continuous algorithmic updates are applied. For example, recent patches corrected an issue where the "Subcommunity" column failed to display correctly, and resolved a critical logic error where unqualified youth were inappropriately appearing on the active list.¹⁵

Coordinated Access and CAN Metrics

Beyond the BNL, managing the logistics of the Coordinated Access Network requires detailed operational reporting to track appointments, document verification, and diversion attempts.

Dashboard Section	Report Name	Form ID	Description and Intended Usage
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Coordinated Access	Key CAN Metrics	1000001492	Aggregates macroscopic system flow data, including the total volume of CAN appointments scheduled, assessment outcomes, and systemic diversion success rates. ¹⁵
Coordinated Access	CAN Appointment with Destination	1000001688	Tracks the explicit outcomes of initial Coordinated Access intake appointments, indicating whether a client was successfully diverted, sheltered, or placed on a housing waitlist. ¹⁰
Coordinated Access	CA/CE Due Dilligence	1000001025	Ensures that all federally mandated assessments, document verifications (e.g., proof of chronic homelessness), and vulnerability scorings have been completed for clients navigating the Coordinated Entry process. ¹⁰
Coordinated	CA/CE Due	1000001061	The updated organizational

Access	Diligence (Org) V2		variant of the Due Diligence report, utilized by local CAN managers to audit their intake staff's documentation compliance. ¹⁰
Coordinated Access	Barcode Report	1000001670	Generates scannable barcodes for client identification cards, facilitating rapid, frictionless intake at high-volume emergency shelters and warming centers. ¹⁰
Coordinated Access	Barcode Report (Org)	1000001673	The organizational variant of the Barcode Report. ¹⁰
Coordinated Access	Banned/Barred Clients	1000001940	Maintains a secure, system-wide registry of clients who have been temporarily or permanently restricted from specific facilities due to severe behavioral or safety incidents, ensuring staff security across the CoC. ¹⁰

Data Quality Monitoring and System Integrity

A comprehensive data lakehouse is only as valuable as the fidelity of the information it

contains. Inaccurate, delayed, or logically flawed reporting can result in the loss of millions of dollars in federal block grants and CoC funding. To aggressively mitigate this risk, CT HMIS deploys an automated Data Quality Monitoring suite that functions as a continuous diagnostic layer operating over the entire CaseWorthy database. ¹⁵

Proactive Data Quality Alerts and Outlier Detection

The system has transitioned from retroactive data cleaning (fixing errors only when a report fails) to proactive data governance. This is achieved through an advanced, rule-based engine that computes 27 distinct active Data Quality Alerts nightly. These alerts are surfaced directly on the individual client's dashboard and aggregated at the organizational level, forcing case managers to address missing fields before compliance reports are generated. ¹²

Dashboard Section	Report Name	Form ID	Description and Intended Usage
Data Quality	Data Outliers Report	1000001538	Identifies statistical anomalies and logically inconsistent data points (e.g., a client exiting a program before their entry date, or conflicting demographic data) across defined program types. ¹⁰
Data Quality	Data Outliers Report (Org)	1000001557	The organizational variant of the Data Outliers Report, allowing local data coordinators to clean their agency's data prior to system aggregation. ¹⁰

Data Quality	HMIS Data Quality Report 2024	16380	A comprehensive diagnostic tool that mimics the stringent HUD Data Quality framework. It evaluates completeness, timeliness, and accuracy across all Universal Data Elements (UDEs). ¹⁰
Data Quality	HMIS Data Quality Report 2024 (Org)	1000001914	The organizational variant of the HMIS Data Quality Report 2024. ¹⁰
Data Quality	Timeliness	1340	Measures the lag between when a service or entry/exit occurred in reality and when it was recorded in HMIS. Enforces strict data entry protocols (typically requiring entry within 48 - 72 hours) to ensure real-time CAN accuracy. ¹⁰
Data Quality	Timeliness (Org)	1000000174	The organizational variant of the Timeliness report, utilized by program directors to monitor staff data entry performance. ¹⁰

Data Quality	Overlapping Residential Stays by CoC	13432	Flags clients who are simultaneously enrolled in multiple mutually exclusive housing programs (e.g., checked into two different emergency shelters on the exact same night), highlighting a critical utilization error. ¹⁰
Data Quality	Duplicate Assessment Report	13084	Identifies instances where clients have been administered the same standardized assessment multiple times erroneously, skewing system intake data and wasting staff resources. ¹⁰
Data Quality	Duplicate Assessment Report (Org)	1000001808	The organizational variant of the Duplicate Assessment Report. ¹⁰
Data Quality	Duplicate Clients Created by Users	1000001270	Detects overlapping demographic profiles (e.g., similar names, identical SSNs) to prevent the fracturing of client histories,

			prompting administrators to execute a formal client merge process. ¹⁰
Data Quality	Coordinated Entry Assessments Not Yet Prioritized	14751	Identifies clients who have completed a Coordinated Entry assessment but have not been formally placed onto the prioritization list, indicating a procedural failure in the CAN workflow. ¹⁰
Data Quality	Coordinated Entry Assessments Not Yet Prioritized (Org)	1000001512	The organizational variant of the unprioritized assessment report. ¹⁰
Data Quality	Coordinated Entry Events Without Results	14747	Flags Coordinated Entry events (such as housing referrals or case conferences) that were initiated but never closed with a formal outcome, leaving the client in administrative limbo. ¹⁰
Data Quality	Coordinated Entry Events Without	1000001513	The organizational variant of the

	Results (Org)		unresolved CE events report. ¹⁰
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The integration of these diagnostic reports ensures the viability of the entire ecosystem. For instance, Alert 5 specifically flags "Emergency Shelter enrollment without a bedlist checkin in 30 days".¹² This alert bridges a critical gap: if a client leaves a shelter without formally telling staff, their enrollment remains open, artificially inflating shelter numbers and falsely keeping the client active on the By Name List. The alert forces case workers to officially exit the client, thereby keeping both the DOH Shelter Utilization Report and the CAN BNL highly accurate. ¹²

Operational Intelligence and Program Management

While compliance reports are designed to satisfy external federal and state funders, Operational Reports are architected for internal consumption and agency oversight. They are the instruments through which program directors manage overwhelming caseloads, monitor clinical staff performance, evaluate daily service delivery, and maintain strict data privacy compliance. ⁴ The CaseWorthy platform's automated workflows allow for the frictionless capture of this data during routine, day-to-day case management. ⁵

Program and Client Management Reports

These reports provide granular visibility into program lifecycles, outcome achievements, and the specific narrative documentation produced by case managers.

Dashboard Section	Report Name	Form ID	Description and Intended Usage
Program Reports	Clients in Program	493	Generates an active, real-time roster of all clients currently enrolled in a specific program or facility. Serves as the foundational list for daily operations, roll calls, and emergency evacuations. ¹⁵

Program Reports	Clients In Program (Org)	1000001766	The organizational variant of the active roster report. ¹⁰
Program Reports	Case Notes - All (Org)	1000001961	Extracts all chronological narrative documentation entered by case workers. Fields include Created By UserID, Case Note Date, ServiceTotal, and ProgramID. It is heavily utilized for clinical audits, supervisory review, and subpoena responses. ¹⁰
Program Reports	Clients Exited From Programs	5865	Provides a historical ledger of clients who have been formally discharged, detailing their exit destinations and reasons for leaving. ¹⁰
Program Reports	Client Face Sheet	1000001767	Generates a concise, single-page summary of a client's demographic profile, active alerts, allergies, and emergency contacts, typically printed for physical

			case files or medical transport. ¹⁰
Program Reports	Client Face Sheet (Org)	1000000842	The organizational variant of the Client Face Sheet. ¹⁰
Program Reports	Expiring ROIs	1000000272	Identifies clients whose Release of Information (ROI) consent forms are nearing expiration, prompting staff to secure new signatures to maintain legal data-sharing compliance within the CoC. ¹⁵
Program Reports	Expiring ROIs (Org)	1000001769	The organizational variant of the Expiring ROIs report. ¹⁰
Program Reports	Expired ROI Report	1000001563	Flags clients whose ROIs have already lapsed, indicating an immediate compliance violation where the client's data has been automatically siloed from the broader network. ¹⁰
Program Reports	Expired ROI Report (Org)	1000001770	The organizational variant of the Expired ROI Report. ¹⁰

Program Reports	Placement Indicators	1939	Tracks the trajectory and velocity of clients moving from initial intake, through various supportive interventions, toward permanent housing placement. ¹⁰
Program Reports	Placement Indicators (Org)	1000001771	The organizational variant of the Placement Indicators report. ¹⁰
Program Reports	Program Outcomes	507	Evaluates the success rate of a program against predefined empirical metrics, such as the percentage of clients exiting to stable housing or successfully gaining employment. ¹⁰
Program Reports	Program Outcomes (Org)	1000000178	The organizational variant of the Program Outcomes report. ¹⁰
Program Reports	Program KPI	1813	A high-level dashboard metric report summarizing Key Performance Indicators tailored to specific program models, providing

			executives with rapid programmatic health checks. ¹⁵
Program Reports	Program KPI (Org)	1000001773	The organizational variant of the Program KPI report. ¹⁰
Program Reports	Family Members Missing From Enrollment	4533	Identifies households where the Head of Household is enrolled in a program, but known dependents or spouses were erroneously left out of the enrollment record, correcting per capita funding counts. ¹⁵
Program Reports	Infectious Disease Report	13546	An operational tracking tool implemented during public health crises (such as COVID-19) to monitor outbreaks, vaccination statuses, and medical isolation within congregate shelter settings. ¹⁴

The utility of the **Case Notes - All (Org)** report (Form ID 1000001961) cannot be overstated. By extracting qualitative narratives alongside structured data fields (such as ServiceID and Unit of Measure), clinical supervisors can evaluate the depth and quality of case management. ²³ It ensures that client interactions are meaningful, trauma -informed, and aligned with documented service plans.

Similarly, the **Expiring ROIs** report functions as a critical legal and operational safeguard. Under CT HMIS governance policy, sharing highly sensitive client data (including mental health and domestic violence history) across the CoC requires explicit, documented consent. ¹⁵ If an ROI expires, a client's data becomes immediately siloed by the system's security architecture, severely hindering coordinated care and blinding the By Name List to their status. Proactive notification prevents this systemic breakdown, allowing case workers to intercept the client and renew their consent. In instances where a client explicitly refuses an ROI, HMIS provides strict protocols for entering them as "Anonymous" clients, ensuring they still receive services without compromising their privacy demands. ¹⁵

Financial Oversight and Service Delivery Analytics

Beyond tracking human bodies through physical shelters, the HMIS architecture must account for the vast financial and service resources deployed to stabilize those individuals. Tracking these metrics is essential for grant invoicing, general ledger reconciliation, and evaluating the true cost of ending homelessness for an individual family.

Service Tracking and Financial Reports

These reports quantify the exact services rendered, track the disbursement of direct financial assistance, and measure the long-term retention of housing placements.

Dashboard Section	Report Name	Form ID	Description and Intended Usage
Service Reports	Service Summary	9426	Aggregates the total volume, specific type, and calculated financial value of services rendered (e.g., bus passes provided, counseling hours logged) over a specified period. ¹⁰
Service Reports	Service Summary (Org)	1000000524	The organizational variant of the Service Summary

			report, used for internal grant invoicing. ¹⁰
Service Reports	First Time Served	8980	Isolates individuals who have received their very first service within the reporting hierarchy, acting as an early warning indicator of new influxes into the homelessness system. ¹⁰
Service Reports	First Time Served (Org)	1000001778	The organizational variant of the First Time Served report. ¹⁰
Service Reports	Clients Not Served Recently	2276	Flags clients who are actively enrolled in a program but have not engaged with case management or received documented services within a threshold, highlighting potential client disengagement or staff data entry failure. ¹⁰
Service Reports	Clients Not Served Recently (Org)	1000001777	The organizational variant of the unengaged client report. ¹⁰

Service Reports	Service Request Summary	1000001476	Details the status of internal funding requests (e.g., a case manager requesting \$500 for a client's utility arrears), tracking them from initiation through approval and disbursement. ¹⁰
Service Reports	Service Request Summary (Org)	1000001790	The organizational variant of the Service Request Summary. ¹⁰
Service Reports	Services by Program 8.0	1000001174	A comprehensive breakdown of service delivery categorized strictly by program, allowing directors to evaluate which interventions are most heavily utilized. ¹⁰
Service Reports	Services By Program v8.0 (Org)	1000001175	The organizational variant of the Services by Program report. ¹⁰
Financial Reports	Check Register	1154	An operational financial tracking tool that logs direct financial assistance checks disbursed to third parties (e.g., landlords,

			utility companies) on behalf of clients. 10
Financial Reports	LOD Register	5580	Tracks "Letter of Direction" or similar financial authorization documents, ensuring that HMIS financial tracking aligns with the agency's general ledger and accounting software. 10
Placement Reports	Retention Report	6984	A highly critical longitudinal report that measures the percentage of clients who remain stably housed at 6, 12, and 24 month intervals after being placed in permanent housing. 10
Placement Reports	Retention Report	1000000937	The organizational variant of the Retention Report, utilized by housing coordinators to track their specific programmatic success. 10
Placement Reports	Employment	9360	Tracks successful transitions into the

	Placements		workforce, typically utilized alongside the Secure Jobs initiative to measure economic stabilization. ¹⁰
Goal / Outcome	Goal Outcomes	521	Measures client progress against individualized service plan goals (e.g., attending three substance abuse meetings, completing a resume), quantifying qualitative case management achievements. ¹⁰
Goal / Outcome	Goal Outcomes (Org)	1000001784	The organizational variant of the Goal Outcomes report. ¹⁰

The financial reporting capabilities of CaseWorthy bridge the gap between social work and fiscal responsibility. By utilizing the **Service Request Summary** alongside the **Check Register**, agencies can securely manage restricted funds, ensuring that rapid re-housing subsidies or prevention funds are allocated appropriately and transparently. ⁴ This seamless integration ensures that nonprofits can demonstrate absolute stewardship of public and private resources during audits. ⁴

Targeted Demographics: Veterans, Youth, and Health

Different subpopulations experiencing homelessness exhibit unique vulnerabilities and therefore require highly specialized funding streams and entirely distinct reporting paradigms. The CaseWorthy system features dedicated reporting modules tailored specifically for military Veterans, unaccompanied youth, and individuals living with severe health conditions such as HIV/AIDS.

Veteran and HOPWA Compliance

The federal initiative to achieve "functional zero" for Veteran homelessness relies on rigorous tracking and rapid intervention, primarily funded through the Supportive Services for Veteran Families (SSVF) program and the Homeless Veterans' Reintegration Program (HVRP).

Dashboard Section	Report Name	Form ID	Description and Intended Usage
Veteran / HOPWA	SSVF V2	1000000750	Generates strict compliance data for the Department of Veterans Affairs, tracking the efficacy of rapid re-housing and homelessness prevention interventions for Veterans and their families. ¹⁰
Veteran / HOPWA	SSVF V2 (Org)	1000000754	The organizational variant of the SSVF compliance report, utilized by local VA-grantee agencies to audit their specific financial and housing metrics. ¹⁰
Veteran / HOPWA	CT Veterans Project Report	1000000868	Provides a comprehensive, statewide overview of all Veterans engaged anywhere within the HMIS ecosystem, used for high-level

			cross-agency coordination. ¹⁰
Veteran / HOPWA	Current Vets / Last 120 Days Exited	1000000725	An operational roster tracking Veterans who have recently transitioned into housing. Ensures that highly vulnerable clients do not fall out of contact during the critical early months of independent living. ¹⁰
Veteran / HOPWA	HVRP	1609	Tracks the Homeless Veterans' Reintegration Program, focusing heavily on workforce development, skills training, and employment placements for Veterans. ¹⁰
Veteran / HOPWA	HOPWA APR	1237	The Annual Performance Report specifically for the Housing Opportunities for Persons With AIDS (HOPWA) program, tracking specialized housing subsidies and health

			outcomes. ¹⁰
Veteran / HOPWA	HOPWA APR (Org)	1000002021	The organizational variant of the HOPWA APR, used by local health and housing providers to report to DOH. ¹⁰
Veteran / HOPWA	HIV/AIDS Acuity Index Report	1000001691	Evaluates the intersecting vectors of medical vulnerability and housing instability for individuals living with HIV/AIDS, ensuring that housing placements align with proximity to necessary health care access. ¹⁰
Veteran / HOPWA	HIV / AIDS Acuity Index Report (Org)	1000001692	The organizational variant of the HIV/AIDS Acuity Index Report. ¹⁰
Veteran / HOPWA	Ryan White Report Summary	11946	Aggregates data for the Ryan White HIV/AIDS Program, focusing on medical case management, outpatient ambulatory health services, and medical transportation. ¹⁰

Veteran / HOPWA	Ryan White Service Report	1282	A granular, service-level extraction for Ryan White funding compliance. ¹⁰
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System updates constantly refine the data collection architecture to meet the strict parameters of these federal programs. For instance, recent CaseWorthy visibility rules were implemented so that the "Start Date of Financial Assistance" field on the HMIS Add Service form is explicitly limited to SSVF Rapid Rehousing or Homelessness Prevention projects funded specifically by "VA: SSVF".¹⁵ This level of database constraint prevents non-compliant data entry at the source, drastically streamlining the eventual execution and validation of the complex SSVF V2 report.

Youth Reporting

Youth homelessness requires a delicate approach, distinct from adult chronic homelessness. It often involves Runaway and Homeless Youth (RHY) funding, Youth Navigators, and interventions focused on family reunification or transitional living rather than immediate permanent supportive housing.

Dashboard Section	Report Name	Form ID	Description and Intended Usage
Youth Reports	Youth Client Report	1000001243	A comprehensive demographic and clinical extraction of unaccompanied youth navigating the system, highlighting vulnerabilities such as exploitation or educational disruption. ¹⁰
Youth Reports	Youth Data Monthly Report	1000001251	Aggregates short-term trends in youth homelessness,

			allowing CoCs to respond rapidly to seasonal spikes in youth displacement. ¹⁰
Youth Reports	Youth Data Regional Report	1000001247	Aggregates youth data geographically, allowing statewide planners to identify specific CANs or counties requiring augmented youth navigator resources. ¹⁰

System Administration, User Analytics, and Interactive Dashboards

Managing a statewide HMIS database accessed by hundreds of concurrent users across dozens of distinct, legally separate organizations requires robust administrative oversight. CaseWorthy provides specialized reports designed explicitly for system administrators to monitor user behavior, audit system utilization, maintain network security, and visualize macroscopic trends for public and legislative consumption. ³

Administrative and User Reports

These reports ensure that the system is being utilized securely, efficiently, and in strict compliance with the CT HMIS Policies and Procedures Manual regarding data privacy and access rights.

Dashboard Section	Report Name	Form ID	Description and Intended Usage
User Reports	Usage Report v1.0	1000002023	Harvests meta-data from the SSRS audit trail to display the

			<p>execution frequency of all system reports, grouped by Name, Year, and Month. Used by administrators to optimize system load and identify obsolete reports for retirement. ³</p>
User Reports	User Access Report v2	1000001485	<p>Audits user permissions, roles, and organizational access rights. Crucial for ensuring compliance with the CT HMIS security framework and preventing unauthorized data access or HIPAA/PII breaches. ¹⁰</p>
User Reports	User Access Report v2 (Org)	1000001541	<p>The organizational variant of the User Access Report, allowing agency Data Coordinators to audit their own staff's system privileges. ¹⁰</p>
User Reports	Case Load Report - CT HMIS	1000001697	<p>Quantifies the exact number of active clients assigned to individual case managers across</p>

			the network. Essential for preventing staff burnout and ensuring equitable distribution of clinical labor. ¹⁵
User Reports	Case Load (Org)	1000001698	The organizational variant of the Case Load Report, utilized by local clinical supervisors. ¹⁰
User Reports	Concurrent Users	12739	Monitors system strain by tracking the exact volume of active, logged-in user sessions at any given time, aiding IT staff in server scaling and performance diagnostics. ¹⁰
User Reports	Concurrent Users (Org)	1000001782	The organizational variant of the Concurrent Users report. ¹⁰
CT HMIS Admin	Organization / CAN Participation	1000001275	Maps the highly complex administrative hierarchy of agencies, delineating precisely which organizations participate in which

			Coordinated Access Networks, and managing systemic MOUs. ¹⁵
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The **Usage Report v1.0** represents a sophisticated layer of meta -analytics. By analyzing report execution patterns across the state, system administrators can identify which reporting tools deliver the most value to the community, and which are obsolete, thereby streamlining the user interface and significantly reducing server processing overhead during peak reporting seasons.³ Meanwhile, the **User Access Report** fulfills a direct legal mandate from the CT HMIS Policies and Procedures Manual, which requires lead agencies to formally audit network security, desktop protocols, and user access rights on a quarterly basis. ²⁵

Interactive Visual Analytics and Data Dashboards

To democratize data and allow stakeholders, CoC leadership, policymakers, and the public to comprehend systemic trends without parsing dense, raw CSV files, CT HMIS deploys a suite of highly visual, interactive dashboards built on Microsoft Power BI. ⁶

1. **CT HMIS – Homeless in CT Dashboard:** Refreshed weekly, this dashboard provides the most comprehensive view of immediate homelessness metrics in Connecticut. It tracks the unduplicated count of clients in Emergency Shelter Night by Night (ES NbN), Emergency Shelter Entry/Exit (ES E/E), and Street Outreach programs. It features explicit "Action Items" sections that highlight critical system failures, such as the exact volume of ES E/E clients with program durations exceeding 45 days (e.g., 260 clients in a recent report), prompting immediate systemic review and intervention by housing coordinators. ⁶
2. **Exits from Emergency Shelter and Street Outreach Dashboard:** Analyzes systemic flow by categorizing client exits into permanent, temporary, institutional, or "places not meant for human habitation" situations. It allows users to filter deeply by CAN, CoC, and specific program types, evaluating the true "success rate" of the system over the Last 7 Days (L7D), Last 6 Months (L6M), and Month-to-Date (MTD).⁶
3. **PSH/RRH Returns to Homelessness Dashboard:** A vital recidivism tracker that directly monitors the long -term efficacy of systemic interventions. It tracks clients who previously exited to Permanent Supportive Housing (PSH) or Rapid Re-Housing (RRH), identifying the exact percentage that relapse into homelessness (e.g., tracking 1,266 total exits with 156 returns, yielding a 12% return rate over a 6-month period). It further details their explicit destination upon return, whether to emergency shelters (40%) or unsheltered environments (21%).⁶
4. **CT HMIS Programs Dashboard:** Visualizes the massive expansion of the HMIS ecosystem itself. It tracks the growth of open programs from pre -FY14 (430 programs) to FY25-26 (1,745 programs). It breaks down inventory by type (Permanent Supportive Housing,

Rapid Re-Housing, Services Only), allowing strategic planners to see the ratio of temporary emergency shelters to permanent housing solutions, facilitating data -driven funding reallocation. ⁶

5. **CT HMIS User Activity Dashboard:** Tracks engagement levels within the CaseWorthy platform itself, monitoring active user counts, monthly growth of new users, and average daily logins. This ensures that the state's investment in the software is translating to actual utilization by field staff. ⁶

Archival Protocols and Version Control

The regulatory environment of human services is inherently volatile. As HUD frequently revises its Data Standards (e.g., the complex transitions from the 2022 standards to the 2024 standards, and subsequently to the sweeping 2026 standards), the underlying SQL logic of compliance reports must be completely rewritten. ⁶ However, modifying a report directly destroys the system's ability to recreate historical data for audits. Consequently, the CT HMIS utilizes a rigorous version control and archival protocol, deliberately retaining obsolete reports in dedicated dashboard sections. ¹⁰

Dashboard Section	Report Name	Form ID	Description and Intended Usage
Archived Reports	RETIRED 2022 APR v. 1	14883	Contains the legacy Annual Performance Report logic. Maintained strictly for historical auditing, allowing agencies to faithfully recreate reports for prior grant cycles under the old rules. ¹⁰
Archived Reports	RETIRED 2022 APR v. 1 (Org)	1000001204	The organizational variant of the legacy 2022 APR. ¹⁰

Archived Reports	RETIRED By Name List (BNL) v2.11	1000001947	Preserves an earlier algorithmic logic of the BNL. Essential for legal or systemic reviews of exactly how clients were prioritized and triaged in past years. ¹⁰
Archived Reports	HMIS Data Quality Report 2022	15057	The deprecated data quality framework. Retained to analyze historical data fidelity prior to the implementation of the newer 2024 active alert system. ¹⁰
Archived Reports	RETIRED Coordinated Entry APR v. 1.3	14882	A prior iteration of the CE APR, archived to ensure that evolving federal definitions of Coordinated Entry do not retrospectively corrupt or alter past performance metrics. ¹⁰
Archived Reports	HMIS CSV Export 2022 v 1.1- CTHMIS	1000001687	The legacy CSV export formatting. Retained in case federal auditors require raw data formatted to the older 2022 CSV

			schema. ¹⁰
Archived Reports	RETIRED HUD CSV Export 2024	16364	The recently deprecated 2024 CSV export schema, replaced by the FY2026 standards. ¹⁰
Reports in Testing	By Name List (BNL) v.2.6- QA	1000001637	Represents the Quality Assurance testing environment for new reports. Allows system administrators to run parallel calculations against active reports to verify logic before pushing to production. ¹⁰
Reports in Testing	By Name List (BNL) v2.5- Public	1000001633	A sanitized version of the BNL logic designed for public or generalized testing. ¹⁰

Archival dashboards are not merely digital storage; they are a vital component of institutional memory and legal compliance. When a CoC or local agency undergoes a stringent HUD or VA audit for a grant executed in 2022, they must generate and defend data according to the programmatic rules defined in 2022. The intentional preservation of reports like the **HMIS CSV Export 2022 v 1.1** (Form ID 1000001687) guarantees that agencies can comply with retroactive federal inquiries without experiencing data friction or logical errors caused by the implementation of newer, conflicting standards.¹⁰ Furthermore, the "Reports in Testing" section highlights the agile development cycle of the CT HMIS team, demonstrating how complex algorithms like the BNL are rigorously vetted in QA environments prior to operational deployment, preventing catastrophic prioritization errors for vulnerable clients.¹⁰

Strategic Synthesis

The architecture of the CT HMIS reporting ecosystem, as facilitated by the CaseWorthy platform, transcends simple data collection; it functions as a highly integrated, multi-dimensional intelligence platform dedicated to the eradication of homelessness. At the foundational tier, **Operational Reports** (such as Form IDs 493 and 1000001961) ensure that front-line clinical workers and shelter staff can efficiently manage daily crisis interventions, ensuring that beds are filled, case notes are thoroughly logged, and critical privacy consents are maintained.¹⁰

Operating synchronously above this is the **Data Quality Monitoring** suite (Form IDs 1000001538, 16380). By acting as an automated governance layer that continuously sweeps the database for logical outliers, duplicate entries, and missing check-ins, it guarantees that the data flowing upward is pristine.¹⁰ This is not merely an administrative or bureaucratic exercise; pristine data is the absolute prerequisite for securing and maintaining federal funding.

The apex of this architecture is the generation of macroscopic **Federal Compliance Reports** (Form IDs 16789, 16786) and dynamic, real-time triage tools like the **By Name List** (Form ID 1000002040).¹⁰ These tools perform the vital task of transforming granular, daily case management inputs into systemic intelligence. They empower state departments, CoC leadership, and federal overseers to calculate the exact systemic length of time individuals remain homeless, track returns to homelessness with statistical precision, and deploy targeted, heavily funded interventions—such as the Secure Jobs pilot or DMHAS Acuity indexing—directly to the most vulnerable populations in Connecticut.⁶ As the HMIS landscape transitions fully into the FY 2026 HUD Data Standards, the ecosystem's reliance on automated workflows, API-driven data extracts, and proactive system usage analytics will only intensify, ensuring the state remains agile, compliant, and profoundly equipped to combat the complexities of housing instability.

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