Understanding the Program Roster Report

In This Info Sheet

The Program Roster Report [GNRL-106] is one of the most useful reports built into our HMIS. This report provides an excellent accounting of the current state of your program and details about your clients. The HMIS team suggests that users run this report regularly to identify common data quality errors so they can be resolved before they impact your data. In order to understand this report, you will first need to know how to run it. Please utilize the [GNRL-106] Program Roster job aid for detailed instructions on how to run this report, including report parameters and using the drill down function.

Client Confidentiality

Client Personally Identifiable Information (PII) gained from HMIS should never be shared with the public, including any images that show client names and/or information. All client data shown throughout this document was created for training purposes and is not connected to any real clients.

Program Roster Layout

When you run a program roster in the web page format, you will see something like the image below. In the top right corner of the report, you can see the Agency or Organization that runs this program and some of the parameters of the report. Just above the report there is a small section that explains the color coding and acronyms.

One of the benefits of running the program roster in a web page format is that you can easily identify which clients are enrolled as individuals and which are enrolled in groups. All clients enrolled in a group will be listed together in a shared row. For example, we know that Elyse and Tony Jarvis are in a group enrollment because their names and information are listed one after another in the same box. We also know that Davina Deitrich is enrolled as an individual, as she is the only person listed in the box that surrounds her information.

Program Roster Report

Sacramento County
Active within 04/01/2025 thru 07/31/2025

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, = Non PH Project, **A:** Assessments, **S:** Services, **CN:** Case Notes
You can find more information about adjusted Move-In Date at the Help Center Article
Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
Program: [Sac County] Emergency Shelter (Entry/Exit)												
Harris, Julie	26DD2FE2A	07/07/2007	10	18	08/31/2017	-	2,892		0	0	1	H. Trainee08
Sisfetwo, Alisha	**B27ADDC02**	05/08/1991	33	34	04/03/2025	06/17/2025	75		0	5	0	H. Trainee16
Sisfetwo, Amy	405F7C66E	11/10/2013	11	11	04/28/2025	06/17/2025	50		0	4	0	H. Trainee16
Jarvis, Elyse	**B44AECDE7**	06/23/1981	43	44	01/07/2025	04/06/2025	89		0	5	0	H. Trainee16
Jarvis, Tony	B0BE23809	12/10/2008	16	16	01/07/2025	04/06/2025	89		0	4	0	H. Trainee16
Dietrich, Davina	**C5EBC064F**	12/10/2007	17	17	04/28/2025	04/28/2025	0		0	0	0	H. Trainee16

The client information in the image above is completely fabricated. No real client data has been shared.

Using the Drill Down Feature

The report drill down feature is available when you run a web page report. This feature allows you to click on the client's name and/or UID, which automatically opens the client's profile in a new tab for easy review. This is a useful feature to avoid having to copy/paste client's name or UID to enter into the search screen to find the client's profile.

Primary Client Demographics

The beginning of the report shows the client's basic demographics including their name, UID, birth date, age at entry, and current age.

Client	Unique Identifier	Birth Date	Age At Entry	Current Age
Program: [Sac County] Emergency Shelter (Entry/Exit)				
Harris, Julie	26DD2FE2A	07/07/2007	10	18
Sisfetwo, Alisha	**B27ADDC02**	05/08/1991	33	34
Sisfetwo, Amy	405F7C66E	11/10/2013	11	11

Client Names

Reviewing the client's names can help you identify any clients who have been accidentally enrolled in your program more than once.

Client UIDs

UIDs are automatically assigned when their profile is created in HMIS. The UID for the Head of Household (HoH) is bold, allowing for easy visual identification of group vs. individual enrollments. If you see any households – individual or group – where none of the clients' UIDs are bold, it means that no HoH has been assigned. This is a data error. Most of the time, this error occurs when the HoH is exited from the program but their family members accidentally remained enrolled. This error can cause many data quality issues and should be fixed as soon as possible.

Lastly, using the client's UID is the best way to communicate about your clients to protect their identities. If you are emailing HMIS for assistance, please make sure to use the client's UID instead of their name, birth dates, or social security numbers. Sharing the client's PII is a violation of the security rules of our system so we ask that users be extremely careful with their work.

Birth Date, Age at Entry, and Current Age

The next columns include the client's birth date, their age when they were initially enrolled in the program, and their age when you are running this roster. These columns provide a quick way to identify minor clients (under 18 years of age) who should be enrolled with a parent or guardian. Please note that there are child-only households in HMIS. Some clients have been emancipated, making them legally responsible for their own care prior to turning 18. Additionally, there are programs designed to work with runaway youth where clients are often younger than 18 and enrolled individually.

Client	Unique Identifier	Birth Date	Age At Entry	Current Age
Program: [Sac County] Emergency Shelter (Entry/Exit)				
Harris, Julie	26DD2FE2A	07/07/2007	10	18
Sisfetwo, Alisha	**B27ADDC02**	05/08/1991	33	34
Sisfetwo, Amy	405F7C66E	11/10/2013	11	11

In the image, you can see the first line shows Julie Harris was 10 years old when she was originally enrolled in this program and is currently 18. While she is now legally an adult and able to be enrolled individually, she was not when she was enrolled. As mentioned before, the UID of the Head of Household (HoH) is bold. Even when you have a household of one, their UID will be bold. Julie Harris's UID is not bold, which means that her program enrollment has no assigned HoH. This needs to be fixed right away. Either the client was accidentally enrolled as an individual instead of part of the group enrollment with the adults in their household or the HMIS user exited the adult client(s) from the program and forgot to exit the child. The age data in the Program Roster Report also provides information about clients who were enrolled prior to their birth, which is a common mistake when adding a newborn to an existing group enrollment. This also needs to be fixed right away.

Additionally, this will help you identify another very common data quality error. Minor clients often age into adulthood (turn 18) during a program enrollment. As minor clients cannot sign legal documents, they have Household ROIs which indicate that the consent for this client's information to be shared in HMIS is covered under their parent's consent documents. For any client who turns 18 while they are enrolled in your program, you must end their Household ROI the day before their 18th birthday and have them sign a new consent form which will be dated on their 18th birthday. For much more detailed information about ROI categories and obtaining consent from clients who age into adulthood, please review our Client Consent / Release of Information Job Aids section of our Job Aid Webpage.

Enroll Date and Exit Date

Enroll Date	Exit Date	LOS	Housing Move-in
08/31/2017	-	2,892	
04/03/2025	06/17/2025	75	04/06/2025
04/28/2025	06/17/2025	50	04/06/2025
01/07/2025	01/07/2025	1	
01/07/2025	01/07/2025	1	

The dates in the Enroll Date and Exit Date columns are a very helpful way of identifying clients who should have already been exited from your program. By scanning the client names, you may know that certain clients are no longer participating in your program. Reviewing the roster can help you easily identify clients who have not been properly exited from the program in HMIS.

The enrollment and exit dates can also help us to see if an HMIS end user only exited the Head of Household (HoH) from the program enrollment and left the additional family member enrolled in the program accidentally as the group enrollment would show an exit date for the HoH, but no exit date for the other household members.

Lastly, if the client's enrollment and exit dates are the same, the enrollment likely has a data quality error, including a possible auto exit. Read more about auto exits in the next section of this document about the Length of Service (LOS) column.

Length of Service (LOS)

The Length of Service column (LOS) calculates the number of days the client was enrolled in your program.

Enroll Date	Exit Date	LOS	Housing Move-in
08/31/2017	-	2,892	
04/03/2025	06/17/2025	75	04/06/2025
04/28/2025	06/17/2025	50	04/28/2025
01/07/2025	01/07/2025	1	
01/07/2025	01/07/2025	1	

Programs that Limit the Time a Client Can Be Enrolled

If your program has a limit to the number of days that a client can be served, this is a very helpful column. You can easily identify clients who will need to be exited soon and find any enrollments that have exceeded the time limit. If you find errors like these, you need to exit the client as soon as possible to maintain data accuracy.

Auto Exits

The auto exit function allows the HMIS system to automatically exit clients who have had no activity – no services or assessments – in their enrollments after 90 days. HMIS Data Quality Standards require that users document services for their clients at least once a month for active enrollments. Once the client's enrollment has seen no activity for three consecutive months, the system automatically exits them from the programs. You can read much more in our Understanding Auto Exits job aid.

The LOS column of the program roster is a great way to identify clients who have been auto exited. In the image above you have the group enrollment that started and ended on 1/7/2025. Any enrollment that starts and ends on the same day is most likely a data quality error.

In addition to being auto exited, clients enrolled and exited on the same day may indicate other data quality issues. There are rare situations where a one-day enrollment is accurate, but the presence of a one-day enrollment is more likely to be an error. Here are some of the other data quality issues that can cause a one-day enrollment.

- When users mistakenly enroll a client in a program as an individual and then realize their error, they will often exit the client on the same day and enroll the client in the program again in the correct group enrollment. To properly address this mistake, the user should instead reach out to HMIS so we can merge the enrollments and avoid having inaccurate data showing the client was enrolled in your program more than once.
- Sometimes clients are enrolled in programs and then determined to be ineligible or decide to decline services soon after. If the client received any services – like referrals or assessments – you will simply exit the client from the program on the most accurate date and then document what happened in the client notes. However, if the client did not receive any services from you, you can contact HMIS so the staff can delete the enrollment. If you are asking for an enrollment to be deleted, please explain clearly that no services were provided so the staff can be sure that deleting the enrollment will lead to the most accurate data collection possible.

Housing Move-In

Enroll Date	Exit Date	LOS	Housing Move-in
08/31/2017	-	2,892	
04/03/2025	06/17/2025	75	
04/28/2025	06/17/2025	50	
01/07/2025	-	89	04/06/2025
01/07/2025	-	89	04/06/2025

The Housing Move-In column documents when the clients signed a lease or other agreement and moved into permanent housing. When a client is housed, the HMIS user must go to the client's program enrollment screen and input their Housing Move-in date. Missing Move-In dates are one of the most common data quality errors, causing multiple issues with bed inventory accuracy.

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date

When reviewing a Program Roster Report, reviewing the Housing Move-In dates and identifying any missing dates will help your organization meet the [Sacramento CoC Community Standards] and avoid the need for future data clean up conversations.

Assessments, Services, and Case Notes

Assessments

A	S	CN
2	0	1
1 1	5 4	0 0
3 3	5 4	0 6
0	0	0

The A column refers to the assessments that have been completed for the client. This number indicates the number of **assessments categories** that have been completed, not the number of assessments. For example, if an HMIS user has added multiple Status Assessments or completed multiple Current Living Situation (CLS) Assessments, the Program Roster report will only count the category as 1 assessment, no matter how many were completed for the client. Common assessments include:

- Status and Annual Assessments
- Current Living Situation (CLS)
- Self-Sufficiency Matrix
- Individualized Support Plan (ISP)

In the image above there are multiple enrollments with a range of assessments completed. The Program Roster report does not provide details about the assessments that were completed, but using the drill down feature, you can click on the client's name or UID to review their profile and identify the assessments by viewing the client's History tab.

Services

The S column refers to the services that have been logged for the client. As with the assessments, this number indicates the number of **service categories** that have been logged, not the number of services. For example, if an HMIS user has repeatedly logged General Case Management services or a monthly Housing Service, the Program Roster report will only count the service category and list 1 service, no matter how many were completed for the client. There are many services available for logging.

A	S	CN
1	0	1
1 1	5 4	0 0
1 1	5 4	0 6
0	0	0

In the image, some clients have multiple services and others have none. If a client is enrolled with no services, the user is not inputting data about the work you are doing with this client and violating the HMIS Data Quality Agreement. Inputting data into HMIS – including logging services – is the primary purpose of being an HMIS participating agency.

Like assessments, logging a service at least once a month not only keeps your client from being auto exited from your program, but also meets the Sacramento CoC Community Data Standards.

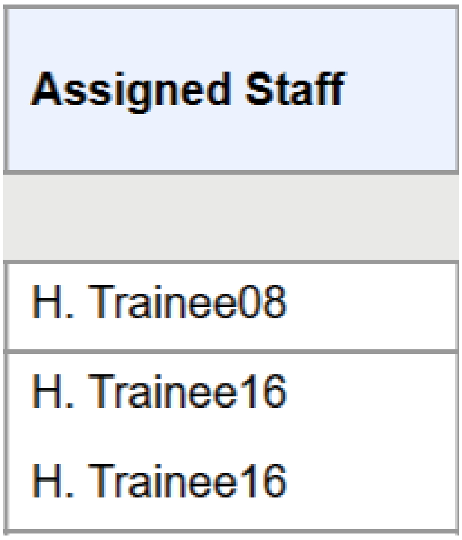
Case Notes

The CN column refers to Case Notes that have been entered for the client. Case Notes are not part of the HMIS Data Quality Agreement and will not stop your client from being auto exited. Case Notes you input in the client's program enrollment will only be visible to HMIS users who have access to view the programs in your agency.

A	S	CN
1	0	1
1 1	5 4	0 0
1 1	5 4	0 6
0	0	0

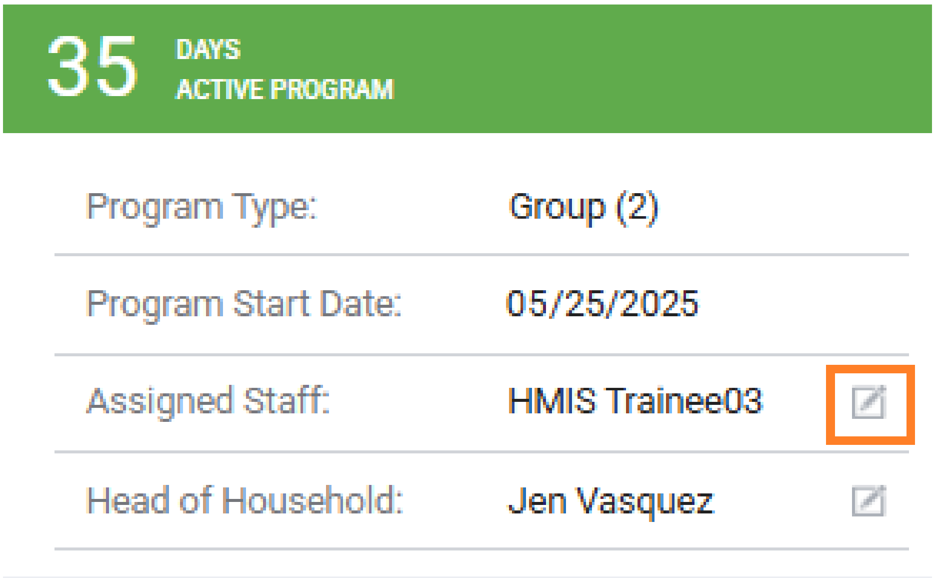
If you have information that you feel would be useful to other organizations when they are working with a client, you can add a case note in the client's global profile as well. If you choose to add a case note for the community to read, please consider exactly what purpose the note has. You want to choose your words carefully to avoid setting the client up for failure in other programs if you are reporting a behavioral problem for others to know about. Case notes do not have an end date, so anything you document in notes at the global level will follow the client throughout their HMIS history.

Assigned Staff

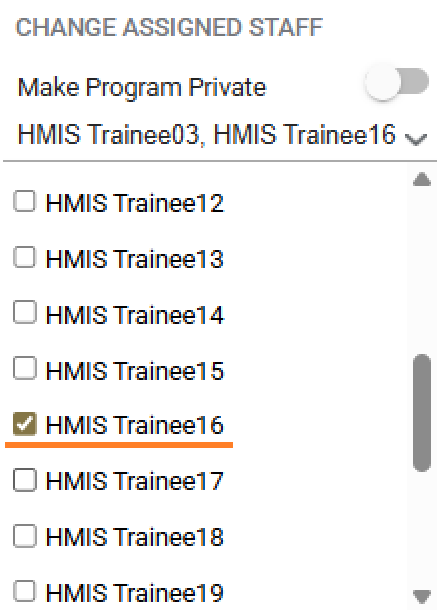


The Assigned Staff column refers to the individual in your organization who is working with this client. Having a designated staff person is helpful if other organizations are working with the same client and want to reach out to collaborate on their care. In the image above, you can see that one of our test accounts – H. Trainee 16 – is assigned to all of these clients. It is likely that H. Trainee 16 enrolled all of these clients, which automatically assigned them as the primary staff member. If this is an error or the client is moved to another user's caseload, you can easily update this information.

To change the staff assigned to a client's program enrollment, look to the right side of the page in the client's enrollment. In this image, you can see the assigned staff was HMIS Trainee03. If we wanted to reassign the client to HMIS Trainee16, we would click on the edit button to the right of the staff's name.



Please note that the client's program enrollment must still be active to change their assigned staff. If you need to make this change after a client has already been exited, please review our job aid for Reopening a Program Enrollment, which is a common task if you are correcting inaccurate information in the client record.



Once you click on that edit button, the Change Assigned Staff box will appear. In the image, you can see a large list of HMIS test user accounts. In this situation, the user has scrolled down to click on HMIS Trainee 16, which has added their name to the line above. However, since clients can have multiple staff members assigned to their enrollment, you will need to uncheck the previous staff member's name to ensure the client doesn't show up on two different case loads. There are programs where more than one staff member is assigned to work with a client, like in the case of programs that have separate housing specialists and case managers who are assigned specific clients. Click the carrot next to the names of assigned staff to close this long list, allow you to click the "Save Changes" button and save your work.

Additional Columns

Unit Assignment	Bed Assignment	Occupancy Start Date	Occupancy End Date

There are some additional columns listed at the end of the program roster. You can disregard these columns as of the creation of this job aid in the Summer of 2025. These are all related to a new bed inventory module in the Homeless Management Information System that Sacramento Steps Forward has not yet implemented in our system. We hope to onboard this new module soon, but it will take significant time to integrate the module into our system and create training to teach HMIS users how to utilize these new tools. It is a complex feature, but one that we hope will greatly improve our ability to understand the bed utilization of the temporary and permanent housing programs working in our CoC.