

The list of Data Elements listed below apply only for Version 3.0. This is the base line standard CMS will provide to agencies. All data elements listed must be available in CMS for agencies to report. If information for any required data elements is not available, default values will be used. Agencies must insist their CMS have the latest version available.

### *Agency Profile - Data Elements*

The following table lists and describes the required data fields for all Agency Profile data elements.

<b>Data Elements Common Titles</b>	<b>Data Descriptions</b>	<b>Value Required Y = Yes N = No</b>
Agency Name	Agency name used in HCS.	<b>Y</b>
Agency HCS ID	HCS system assigned Agency ID (unique number in HCS system)	<b>Y</b>
Agency EIN	Agency federal employee identification number or Tax ID used by IRS	<b>Y</b>
Fiscal Year	Accepts a four digit year to indicate the fiscal year data is reported	<b>Y</b>
Reporting Month	Identifies the month data is reported.	<b>Y</b>
Agency's Dunn's Number	Agency Dunn & Bradstreet identification number	<b>N</b>
Agency Address Line 1	Agency's current physical location address line #1	<b>Y</b>
Agency Address Line 2	Agency's current physical location address line #2 if applicable	<b>N</b>
Agency Address Line 3	Agency's current physical location address line #3 if applicable	<b>N</b>
Agency Address Line 4	Agency's current physical location address line #4 if applicable	<b>N</b>
Agency Address City	Agency's physical location address city	<b>Y</b>

Agency Address State	Agency's physical location address state	Y
Agency Address Zip Code	Agency's physical location address ZIP code	Y
Agency Web Site	Agency's web site URL (address).	Y
Agency's Office Phone Number	Agency's phone number For public information and inquiries.	Y
Agency Alternative Phone Number	Agency's toll free number For public information and inquiries.	N
Agency's FAX number	Agency's fax number For public information and inquiries.	N
Agency's Office Email Address	Agency's office Email For public information and inquiries.	Y
Agency Faith Base	Indicator that identifies the agency as a faith based organization	Y
Agency Colonias	Indicator of services provided to the Colonias population	Y
Agency Migrant Farm Workers	Indicator that the agency serves migrant farm workers	Y
Agency Counseling Budget	Identifies Agency's total Housing Counseling Budget for the support and operations of the agency.	Y
Agency CMS Type	The name of the Client Management System (CMS) used by the agency for the collection and transmission of HUD required data	Y
Contact Type	Identifies the agency personnel position such as: CEO, Office Director, Manager, Counselor, etc.	Y
Contact First Name	Agency personnel's first name	Y

Contact Last Name	Agency personnel's last name	<b>Y</b>
Contact Middle Name	Agency personnel's middle name. Middle initial is accepted	<b>N</b>
Contact Title	Agency personnel salutation such as Mr., Mrs., Ms., etc	<b>Y</b>
Contact Address1	Agency office's mailing street address line 1	<b>Y</b>
Contact Address2	Agency office's mailing street address line 2	<b>N</b>
Contact City	Agency office's mailing address city	<b>Y</b>
Contact State	Agency office's mailing address state	<b>Y</b>
Contact Zip Code	Agency office's mailing address zip code	<b>Y</b>
Contact Phone Number	Agency's Personnel Phone Number	<b>Y</b>
Contact Phone Extension	Agency Personnel Phone Extension if applicable	<b>N</b>
Contact Mobile Number	Agency's Personnel Mobile Phone Number if applicable	<b>N</b>
Contact FAX number	Agency's Personnel FAX Number if applicable	<b>N</b>

Contact Email	Agency's Personnel Email address. For contact from HUD	<b>Y</b>
Language	Language one or more counselors in the agency can speak.	<b>Y</b>
CMS Counselor ID	Counselor ID associated with the agency assigned by the CMS or agency to identify each counselor.	<b>Y</b>
Counselor First Name	Agency counselor first name	<b>Y</b>
Counselor Middle Name	Agency counselor middle name	<b>N</b>
Counselor Last Name	Agency counselor last name	<b>Y</b>

### ***One-on-One Counseling - Client Level Data Elements***

The following table lists and describes the required data fields for all client level data elements required for *counseling* activities, in other words counselor to client or “one on one” counseling.

<b>Data Elements Common Titles</b>	<b>Data Descriptions</b>	<b>Value Required Y = Yes N = No</b>
Client ID Number	Unique identifier the CMS assigns to each client	<b>Y</b>
Client SSN1	Client’s complete social security number	<b>N</b>
Client SSN2	Client’s last 4 digits of their social security number	<b>N</b>
Client First Name	Client’s first name	<b>Y</b>
Client Last Name	Client’s last name	<b>Y</b>
Client Middle Name	Client’s middle name or initial	<b>N</b>
Client Phone Number	Client’s home phone number	<b>Y</b>
Client Mobile Phone Number	Client’s cell phone number if applicable	<b>N</b>
Client Fax	Client’s FAX phone number if applicable	<b>N</b>
Client Email	Client’s Email address if applicable	<b>N</b>

Client Family Size	The number of individuals that live in the client's residence	Y
Client Gender	Client's gender	Y
Client Marital Status	Client's marital status description. Choices include, Marry, Single, Divorce, etc	Y
Client Race ID	Client's race as defined in 9902 form. The CMS assigns an ID associated with the appropriate descriptions.	Y
Client Ethnicity ID	Client's ethnicity as defined in 9902 form. The CMS assigns an ID associated with the appropriate descriptions.	Y
Client Household Head	Indicate if client is designated as the 'Head' of the household	Y
Client Household Gross Monthly Income	Household's gross monthly income from all household members	Y
Client Birth Date	Client's day of birth	N
Client Counselor ID	Identifies the counselor ID assigned to conduct counseling	Y
Client Highest Education	Client's description indicating the highest level of completed education.	Y
Client Farm Worker	Indicate if client is a farm worker.	Y
Client Colonias Resident	Indicate if client is a colonias resident	Y

Client Disabled	Indicate if the client has a disability	Y
Client Dependents Number	Indicates the number of individuals in the household that rely on support	Y
Client Intake Date	Date when client initiated agency counseling services	Y
Client Counsel Session Date Start	The day when the client conducted counseling for a specific counseling service	Y
Client Counsel Session Date End	The day when the client counseling session ended for a specific counseling service.	Y
Client Language Spoken	The language the client is fluent	Y
Client Session Duration	The session is the counseling meeting conducted each time the client meets with assigned counselor. Session duration time will be recorded in minutes.	Y
Client HECM Certificate	Indicate if the client received a HECM certificate	Y
Client Predatory Lending	Indicator of whether or not the client is a victim of predatory lending practices	Y
Client Discrimination Victim	Indicator whether the client is a victim of discrimination in housing	Y
Client Mortgage Closing Cost	Client's Closing cost on the new mortgage from counseling.	N
Client Mortgage Interest Rate	Client's interest rate on the new mortgage from counseling.	N

Client Sales Contract Signed	Indicating the date the sales contract was signed.	<b>N</b>
Client Credit Score	The client's FICO score from a major acceptable credit reporting agency	<b>N</b>
Client Job Duration	Length of time employed in months	<b>Y</b>
Client household Debt	Monthly household liabilities	<b>Y</b>
Client Mortgage Delinquency	Mortgage payments missed in months	<b>N</b>
Client Spouse First Name	Client's spouse first name	<b>N</b>
Client Spouse Last Name	Client spouse last name	<b>N</b>
Client Spouse Middle Name	Client's spouse middle name or initial	<b>N</b>
Client Spouse SSN	Client's spouse complete social security number	<b>N</b>

### ***Group Education Attendee – Client Level Data Elements***

The following table lists and describes the required client level data fields for all attendees of group education.

<b>Data Elements Common Titles</b>	<b>Data Descriptions</b>	<b>Value Required Y = Yes N = No</b>
Attendee First Name	Clients attending agency workshops/education seminars First name	<b>Y</b>
Attendee Last Name	Clients attending agency workshops/education seminars last name	<b>Y</b>
Attendee Middle Name	Clients attending agency workshops/education seminars middle name or initial	<b>N</b>