This checklist includes Clarity items that may require System Admin action to ensure compliance with the 2026 Data Standards, which go live on October 1, 2025.

Note that required Looker updates are not included in this checklist.

**September 1, 2025:** Updated fields, screens, and templates will be available in training instances.

**September 17, 2025:** Updated fields and screens will be available in production instances. The screens will be in the "Inactive Screens” section under SETUP > SCREENS and will have a DO NOT USE prefix. (On October 1, the screens will be set to “Active” and the DO NOT USE prefix will be removed.)

**October 1, 2025:** Updates will be made to picklists and other existing Data Standard fields (no action is needed from system administrators to update these items). Updated templates will be available in production instances; system administrators will need to update custom templates.

| Element | Relevant Area of Clarity | Action Needed |
| --- | --- | --- |
| **Program Setup Screens** | | |
| 2.02 Program Information | Program Setup Screens | Projects funded with **Funding Source** (funding\_source) HUD: Pay for Success (35) and do not provide permanent housing should use Project Type (Field 6) Other (7). |
| 2.06 Funding Sources | Program Setup Screens | For paper forms using **Funding Source** (funding\_source), retire HUD: ESG-CV (47) and HUD: HOPWA-CV (48). Add HUD: CoC Builds (56).  Within Clarity, ESG-CV and HOPWA-CV projects should be closed or have a grant end date entered. |
| 2.09 CE Participation Status | Program Setup Screens | For custom screens / paper forms ensure Field 4 is set as **CE Participation Status End Date**.  \* Likely already set to “CE Participation Status End Date” if custom screens are copied from system program setup screen. |
| **Profile Screens** | | |
| 3.04 Race and Ethnicity | Profile Screens | For custom screens / paper forms using **Race and Ethnicity** (race\_ethnicity), update Hispanic/Latina/e/o to Hispanic/Latina/o.  Additional Race and Ethnicity Detail (Field 2) \*  For custom profile screens / paper forms, set to "**Not Required**".  \* Likely already set to “Not Required” if custom screens are copied from system profile screen. |
| 3.06 Gender | Profile Screens | For custom screens / paper forms that include **Gender** (gender) the field may be removed or "Data Quality Check" set to "**Not Required**" based on community determinations. |
| **Program Screens** | | |
| 3.20 Housing Move-in Date | Enrollment Screens | For custom screens / paper forms, update **Housing Move-In Date** (move\_in\_date) to allow collection for VA: Grant Per Diem – Case Management/Housing Retention projects. |
| 4.05 - 4.10 Specific Disabling Conditions | Enrollment, Status & Exit Screens | For custom screens / paper forms, retire the use of the following fields and any corresponding warnings for VA-funded & HUD: VASH programs.   * **Physical Disability** (health\_phys\_disability) * **Long Term Physical Disability** (health\_phys\_disability\_longterm) * **Developmental Disability** (health\_dev\_disability) * **Chronic Health Condition** (health\_chronic) * **Long Term Chronic Health Condition** (health\_chronic\_longterm) * **HIV – AIDS** (health\_hiv) * **Mental Health Disorder** (health\_mental) * **Long Term Mental Health Problem** (health\_mental\_longterm) * **Substance Use Disorder** (health\_substance\_abuse) * **Long Term Substance Abuse Problem (**health\_substance\_abuse\_longterm) |
| 4.13 Date of Engagement | Enrollment Screens | For custom screens / paper forms, ensure **Date of Engagement** (path\_engagement\_date) is being collected by Street Outreach projects funded by HUD: CoC – Youth Homeless Demonstration Program (YHDP). |
| 4.21 Sex | Enrollment Screens | For custom enrollment screens / paper forms, add **Sex** (sex) for all program types outlined in the [screen configuration document](https://help.bitfocus.com/2026-hmis-data-standards-screen-configuration-guide) and set "Data Quality Check" to "**Required**". |
| C4 Translation Assistance Needed | Enrollment Screens | For custom screens / paper forms that include the following fields, they can now be removed or "Data Quality Check" set to "Not Required".   * **Translation Assistance Needed** (translation\_assistance\_needed) * **Preferred Language** (preferred\_language) * **If Different Preferred Language, please specify** (different\_preferred\_language) |
| R3 Sexual Orientation | Enrollment Screens | For custom screens / paper forms that include S**exual Orientation** (rhy\_sexual\_orientation) and **Other Sexual Orientation (**rhy\_sexual\_orientation\_other), they can now be removed or "Data Quality Check" set to "Not Required". |
| R13 Family Critical Issues | Enrollment Screens | For relevant paper enrollment forms, update R13 Family Critical Issues fields to include response options of "No", "Yes", "Client doesn’t know", "Client prefers not to answer", and "Data not collected".   * **Unemployment – Family member** (rhy\_crit\_unemployment\_family) * **Mental Health Disorder – Family member** (rhy\_crit\_mental\_family) * **Physical Disability – Family member** (rhy\_crit\_disability\_physical\_family) * **Alcohol or Substance Use Disorder – Family member** (rhy\_crit\_substance\_family) * **Insufficient Income to support youth – Family member** (rhy\_crit\_income\_family) * **Incarcerated Parent of Youth** (rhy\_crit\_incarcerated\_parent) |
| V7 HP Targeting Criteria | Enrollment Screens | For custom VA enrollment screen / paper forms, change display names for dependency P to "**Household size of 5 or more requiring at least 3 bedrooms (due to household composition)**" and change dependency Q to "**Households which may include one or more members meeting other criteria for targeting prevention determined by the CoC**". |
| V10 Mental Health Consultation | Enrollment Screens | For custom enrollment screens / paper forms, add the **Mental Health Consultation (**mental\_health\_consultation) field & set "Data Quality Check" to "Required" for all veterans in the following projects:   * VA: SSVF-funded Homelessness Prevention project * VA: SSVF-funded Rapid Rehousing project * VA: Grant per Diem-Case Management/Housing Retention-funded Services Only project |
| **Services** | | |
| V2 Services Provided - SSVF | Services | Create the new (10) “**Healthcare Navigation**” service and service item for any existing programs; set the Start Availability date to October 1, 2025. |
| V3 Financial Assistance - SSVF | Services | Update relevant paper forms to include “**Date Provided**,” to reflect the date the financial assistance was identified as needed, separate from Start Date of Financial Assistance, which reflects the date the financial assistance began. |