Income Changes in HMIS

November 2019
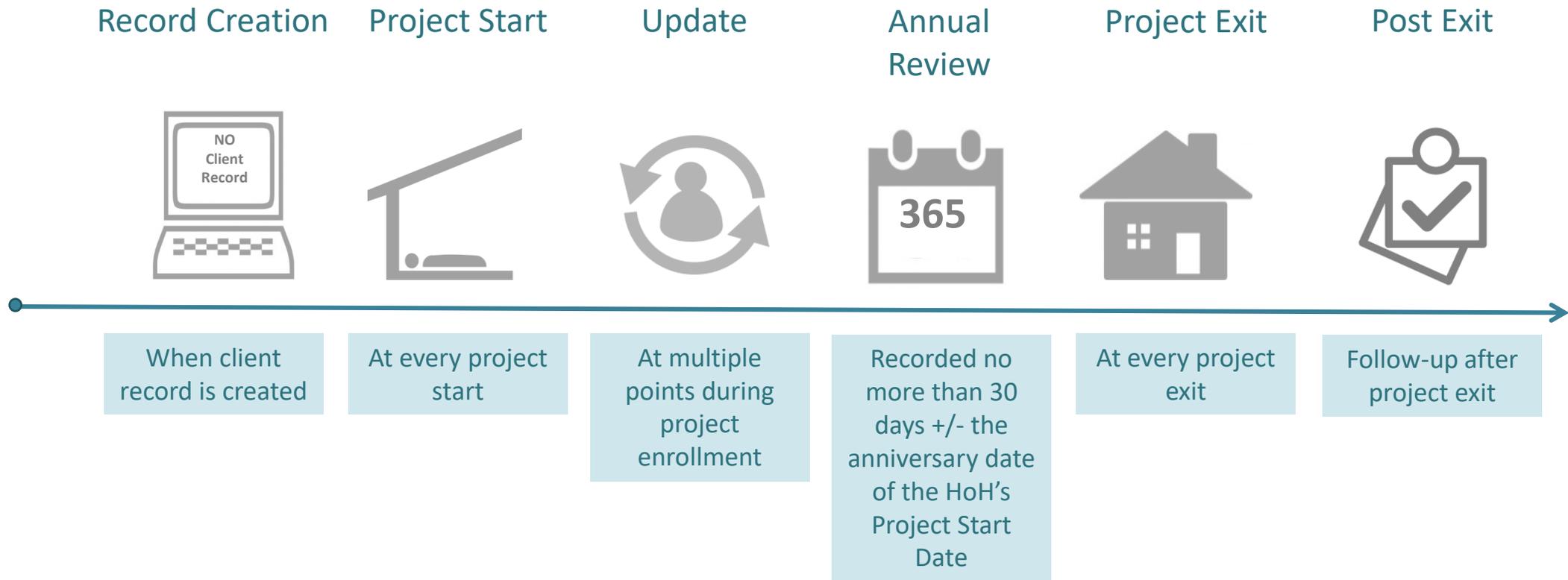
NC COALITION to end HOMELESSNESS

How to Change Sub-assessments

Disability, Health Insurance, **Income, and Non-Cash Benefits** can be changed in:

- Interim Updates

- Interim Annual Assessments

- Exit Assessments

- Post-Exit Follow-ups

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HMIS Data Collection Stages

Record Creation	Project Start	Update	Annual Review	Project Exit	Post Exit
When client record is created	At every project start	At multiple points during project enrollment	Recorded no more than 30 days +/- the anniversary date of the HoH's Project Start Date	At every project exit	Follow-up after project exit

*All Permanent Housing projects must record Move-in dates as an Interim Review – Update.

How to Change Sub-assessments Steps

Steps to change sub-assessments depend on the responses from the initial snapshot of a client at Project Start:

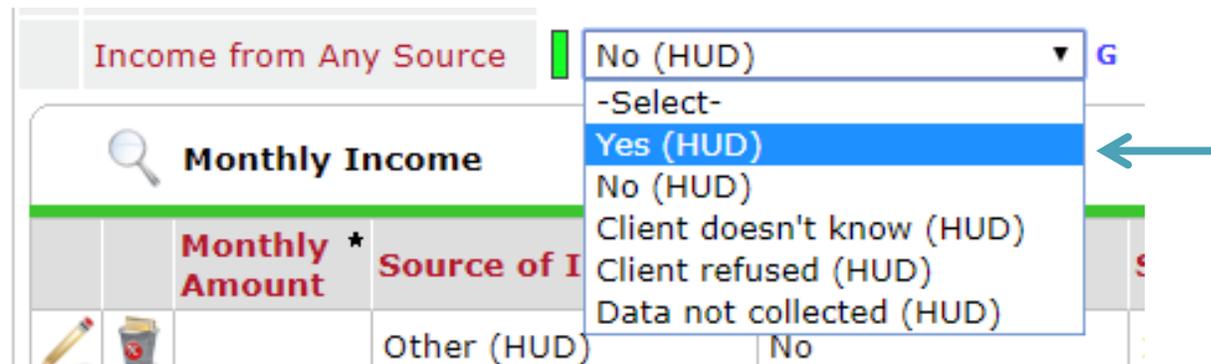| Previous Response	Change or Edit at Update	Action (always check EDA and Backdate)
Gateway = No	Gateway = Yes	Change dropdown to Yes
Gateway = Yes	Gateway = No	Change dropdown to No
Type/Source = No	Type/Source = Yes	Do not edit previous Type/Source. Add new Type/Source as of the Update
Type/Source = Yes	Type/Source = Yes	Edit previous Type/Source and set end-date for day before the Update. Then Add new Type/Source as of the Update
Type/Source = Yes	Type/Source = No	Edit previous Type/Source and set end-date for day before the Update. Then use HUD Verification to set Type/Source to No

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How to Change Sub-assessments

Example A

Wilson Smith has no income at project start on Oct 31st but has $734 SSI income at your meeting on Nov 10th.

Steps to Update

1. Use Enter Data As for the right project and Backdate to 11/10/17.
2. Go to Wilson's Entry/Exit tab and Add an Interim Update.
3. Update the Gateway question to Yes.

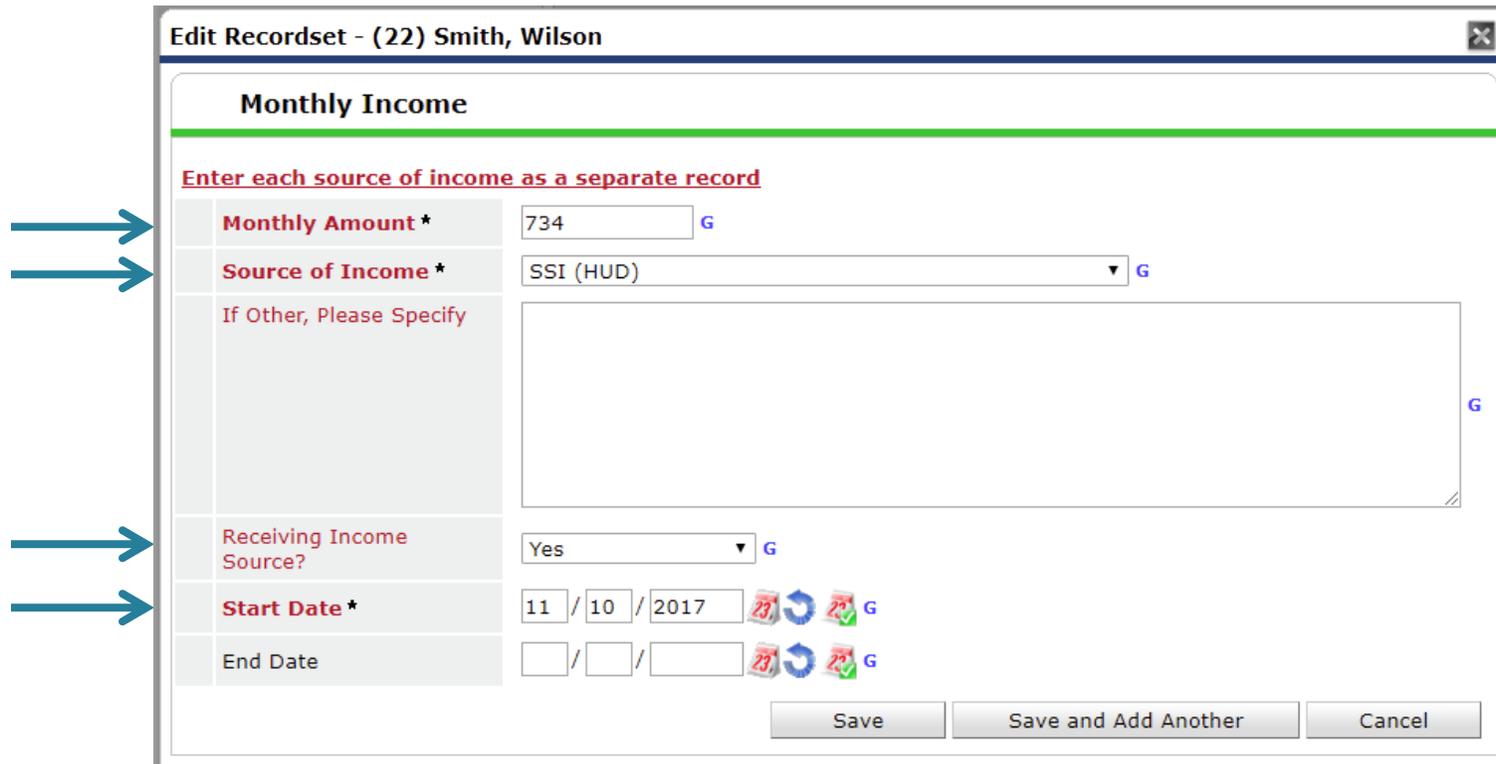# How to Change Sub-assessments

4. Click Add for a new SSI response.

| Add | View Gross Income | Showing 1-5 of 15 | First | Previous | Next | Last |

5. Complete Income Source information.

Edit Recordset - (22) Smith, Wilson

Monthly Income

Enter each source of income as a separate record

Monthly Amount *	734 G
Source of Income *	SSI (HUD) ▼ G
If Other, Please Specify	G
Receiving Income Source?	Yes ▼ G
Start Date *	11 / 10 / 2017 G
End Date	/ / G

| Save | Save and Add Another | Cancel |

How to Change Sub-assessments

6. Now check that the Gateway, Sources, and HUD Verification all align and are correct.
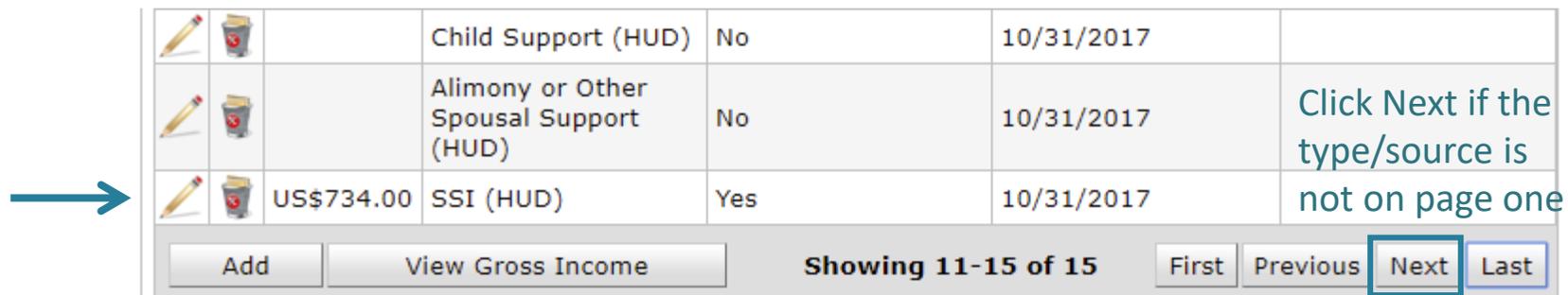
How to Change Sub-assessments

Example B

John Smith is receiving $734 SSI income at project start on Oct 31st but his SSI income has increased to $786 at your meeting on Nov 10th.

Steps to Update

1. Use Enter Data As for the right project and Backdate to 11/10/17.
2. Go to John's Entry/Exit tab and Add an Interim Update.
3. Find the SSI Income Source and click the pencil icon to edit.

✏	🗑		Child Support (HUD)	No	10/31/2017	
✏	🗑		Alimony or Other Spousal Support (HUD)	No	10/31/2017	Click Next if the type/source is not on page one
✏	🗑	US$734.00	SSI (HUD)	Yes	10/31/2017	

Add	View Gross Income	**Showing 11-15 of 15**	First	Previous	Next	Last

How to Change Sub-assessments

4. Set the end-date to the day before the Backdate mode, Nov 9th.

4. Click Add for a new SSI response

How to Change Sub-assessments

6. Complete Income Source information.

How to Change Sub-assessments

7. Now check that the Gateway, Sources, and HUD Verification all align and are correct.

Incomplete or Conflicting Sub-assessments

Error information	Incomplete HUD verification on disability, income, benefits, and/or health insurance sub assessments.
How do I find this error?	Run the APR or CAPER report on Dashboard. - Review the error counts. Run the 0252 Data Completeness Report Card EE in ART. - Review the client detail tab.
How do I fix this error?	Review client file for documents verifying disability, income, benefits, and/or health insurance. ⚠️ Remember: Missing data is ALWAYS better than inaccurate data!

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Are you collecting complete info?

Income & Non-Cash Benefits

HUD requires data collection for every type of Income and Non-Cash Benefit.

Don't miss out on understanding different types of client resources for housing goals.

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Income

What is HUD asking for?

- Regular income that could contribute to or offset housing costs

  Could be any one of these types:

Source of Income
Alimony or Other Spousal Support (HUD)
Child Support (HUD)
Earned Income (HUD)
General Assistance (HUD)
Pension or retirement income from another job (HUD)
Private Disability Insurance (HUD)
Retirement Income From Social Security (HUD)
SSDI (HUD)
SSI (HUD)
TANF (HUD)
Unemployment Insurance (HUD)
VA Service Connected Disability Compensation (HUD)
VA Non-Service Connected Disability Pension (HUD)
Worker's Compensation (HUD)
Other (HUD)

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Non-Cash Benefits

What is HUD asking for?

- Current, ongoing access to mainstream benefits
  All of these options are recorded:

Source of Non-Cash Benefit
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)
Special Supplemental Nutrition Program for WIC (HUD)
TANF Child Care Services (HUD)
TANF Transportation Services (HUD)
Other TANF-Funded Services (HUD)
Other Source (HUD)

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