

HPRP/HMIS Tip of the Week 11

Understanding Income Subassessments

The income subassessment is confusing at best. In this Tip, I will hopefully shed some light on this portion of your HMIS data entry. Here is the way these subassessments show in ServicePoint:

The screenshot shows the ServicePoint interface for entering income data. At the top, there are three input fields: 'Total Monthly Income' with a text box and 'H G' label, 'Income received from any source in past 30 days?' with a dropdown menu showing '- Select -' and 'H G' label, and 'Income subassessment' with a text box. Below these is a table with two columns: 'Monthly Income' and 'Source of Income'. The table currently shows 'No Record Sets'. An 'Add' button is located in the top right corner of the table, circled in red. A callout bubble points to the 'Add' button with the text: 'Click "Add" to begin entering income sources.' At the bottom right of the table area is a link: 'Show Entire List In Window'.

Figure 1: Income Fields and Subassessment

The income fields and subassessment are meant to capture recent income data for the client.

The *Total Monthly Income* field should be the total amount of income received in the last 30 days. If the client received no income in the last 30 days, enter a 0.

"Income Received from any source in the past 30 days?" is a yes/no field. This must be answered.

Even if the client has not received any income in the last 30 days, you must complete the Income Subassessment, which records the details of the client's income.

The screenshot shows the 'Add Income Source dialog box' in ServicePoint. At the top, it displays client information: 'Client Name: Waters, Muddy', 'Client ID: 42073', and 'Monthly Income' with a trash icon. Below this are three buttons: 'Save & Add Another', 'Save & Exit', and 'Exit'. The main section contains the following fields: 'Assessment Date' (06/15/2010 02:19 PM), 'Last 30 Day Income' (text box, 'H G' label), 'Source of Income' (dropdown menu, 'H G' label), 'If Other, Please Specify' (text area, 'H G' label), 'Receiving Income Source?' (Yes/No dropdown, 'H G' label), 'Start Date' (06/15/2010, '(mm/dd/yyyy)', 'H G' label), and 'End Date' (text box, '(mm/dd/yyyy)', 'H G' label). At the bottom, it repeats the client information and the three buttons.

Figure 2: Add Income Source dialog box

To the left, you can see the Income Subassessment window. This is where all income amounts and sources are entered for the client. Clicking the Source of Income drop-down box will give you a long list of possible income sources. Some of those end with "(HUD)". For each of these HUD sources, there must be a record saved as to whether or not the client gets any income from that source. This will hopefully change, but for now, that is the workflow. You will spend some time in this window.

The general workflow here is to enter an amount, select an income source, select yes or no from Receiving Income Source, enter the start date,

and then Save and Add Another, working your way through the list of HUD sources.

Ohio Balance of State

- For records where the client is not receiving the income source selected, leave the Last 30 Day Income field blank, select "No" for Receiving Income Source and leave the Start Date and End Date alone.
- For records where the client is receiving the income source selected, enter the amount the client has received from that source in the last 30 days, leave Receiving Income Source as "Yes", and in the Start Date field, enter the date that begins the 30 day period of time reported in the Last 30 Day Income field, which will just be 30 days prior to the date they entered your program. Leave the End Date blank.

Income Changes and Recertifications: Some Scenarios

- Your client came in a few months ago and at that time was receiving child support. You entered this into her HPRP assessment. Now the client tells you she is not receiving her child support anymore. In order to show this change in her assessment, you will go to her HPRP assessment, find the income subassessment, and click "Show Entire List in Window" (see Figure 1) in order to find the Child Support income source record. Click the pencil next to that record, change the "yes" to "no" for "Receiving Income?" and enter the date she stopped receiving the child support into the End Date field. Save and Exit.
- Your client came in a few months ago, you entered all her income data, and now she comes back for her recertification and at her job, she received a pay raise effective June 1, 2010. In order to show this change, you will go to her HPRP assessment, find the income subassessment, and click "Show Entire List in Window" in order to find the Earned Income income source record. Click the pencil next to that record, change the "yes" to "no" for "Receiving Income?", and enter 5/31/2010 (the last day she was paid at the old rate) into the End Date field. Save and Add Another. Now you will add another Earned Income record with 6/1/2010 (the first day she was paid at the new rate) as the Start Date and her new monthly income.
- Your client has come back for their 3-month recertification and has their proof of income. Nothing has changed. In this case, you would not need to make any adjustments to the income subassessment.
- You have a grandmother receiving SSI on a child. The check is made out to the child, but Granma makes the deposits. The SSI income goes under the child, not Grandma because the check is made out to the child.

**The following is admittedly a gray area, and the most important thing is that what you're doing is consistent across your CoC, across all families, and that in each household, only one person has that income listed.

- Mom is receiving child support from dad. The checks/money orders are made out to Mom. This income goes under Mom, not the child because the check is made out to the Mom.

There is a lot of justified frustration over the requirement to save income sources that are not received by the client. Many of us at COHHIO and around the nation are attempting to convince Bowman to change the way the database handles this issue. It's important that for now the data is entered this way because the reporting to HUD may require that these data elements be exported in this way. We are aware that it adds hours of unnecessary data entry work and are working to get this workflow changed to something that makes more sense.

Comments, questions, and feedback are welcome. If you would like to not receive "HPRP HMIS Topic of the Week" anymore, or would like to be included, please email genelledenzin@cohhio.org.