# HMIS Workflow: Completing Sub-Assessments

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## **Sub-Assessment Overview**

This document will review the following topics:

- Completing a Sub-Assessment
- Updating a Sub-Assessment
- Completing an Annual Assessment (required for all household members!)

HMIS Data Standards include collecting data on Program Specific Data Elements (PSDEs), which depict characteristics of a client at <u>Project Entry</u>, <u>Interim</u> (Update &/or Annual assessments), and <u>Project Exit</u>. More information can be found on the HUD Exchange at <a href="https://www.hudexchange.info/programs/hmis/">https://www.hudexchange.info/programs/hmis/</a>

Often funders require grantees to collect and report out on this information. For accurate CoC and project level reporting it is imperative that this information is captured correctly.

Client details of the four 'Common' PSDE categories are found in the HMIS Sub-Assessments:

#### 1. Disabilities

a. Answer for all household members

## 2. Monthly Income

a. Answer for Head of Household & all Adults

#### 3. Non-Cash Benefits

a. Answer for Head of Household & all Adults

#### 4. Health Insurance

a. Answer for all household members

Never delete a previous record! Only End Date the previous record & then add a new record.

\*\* If you believe a recorded response is inaccurate & should not be in the client's HMIS record, please contact the Help Desk for assistance \*\*

All client data entered into HMIS <u>must</u> reflect what the client self-reports. Information in the clients HMIS record and paper records should match.

## **Completing a Sub-Assessment**

End Users will encounter sub-assessments throughout the HMIS workflows. Upon <u>Project Entry</u>, HMIS will require the collection of PSDEs, along with the corresponding HUD Verification, in the clients HMIS record.

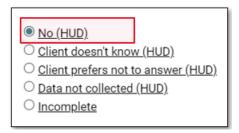
- <u>HUD Verifications</u> identify what resources the client is/is not accessing, and what disabilities the client reports as having or not having. When you complete the HUD Verification, your are verifying the client has reported either having or not having each resource or disability type listed in the sub-assessment.
  - o To begin, answer the 'header question' for each HUD Verification.



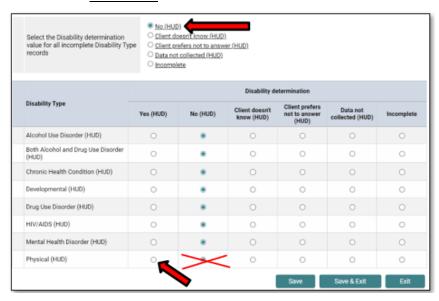
- This answer must correspond to answers recorded in the sub-assessment. Depending on how the client replies, the recorded response are:
  - Yes
  - No

- Client doesn't know
- Client prefers not to answer
- Data not collected (This is only to be used when the client was not asked the question. This will pull as an error on reports.)
- Next, click on '<u>HUD Verification</u>', and complete the sub-assessment
- Every individual resource/disability type listed must have a current (not end dated) response recorded
  - **Tip Time Saver!** Rather than manually entering a response for each individual resource/disability type, select the response option at top of sub-assessment that applies to the *majority* of the individual resource/disability types & auto-fill that response for all the individual types.

Then, for the individual resource/disability type(s) that differs, you only need to manually edit that response.



- Example: Client reports they only have a *Physical* disability
  - o Click 'No' at the top to auto-fill all of the listed Disability types
  - Next, edit the response for the <u>Physical</u> disability to 'YES'
  - Click 'Save & Exit'



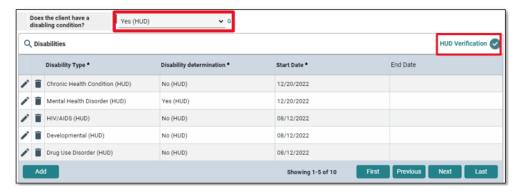
- o Reports will not reflect Resource/Disability types that have an End Date
- Use magnifying glass to quickly see HUD Verification responses



The red exclamation point indicates that not all of the HUD Verifications <u>have not</u> been completed



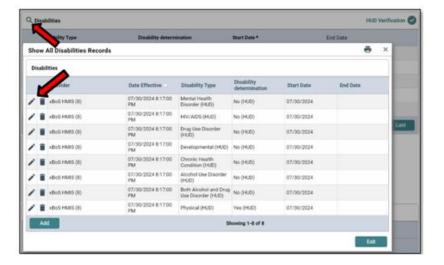
A green check mark indicates that all of the HUD Verifications <u>have been</u> completed



## **Updating a Sub-Assessment**

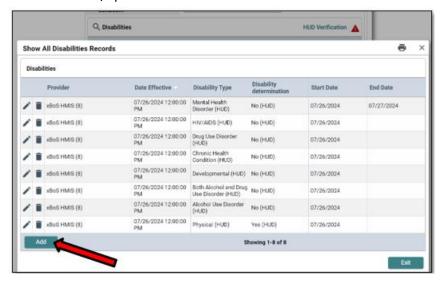
When updating a Sub-Assessment, **do NOT** <u>change</u> or <u>delete</u> previous responses! A recorded response that is no longer true, must be End Dated and new (updated) response must be added. From the Entry/Exit tab, click '<u>Interim</u>' and select type '<u>Update</u>'.

- To begin, if needed, update the 'header question'
- Next, Click on the magnifying glass & select the pencil next to the resource/disability type that is changing



## • Add the End Date

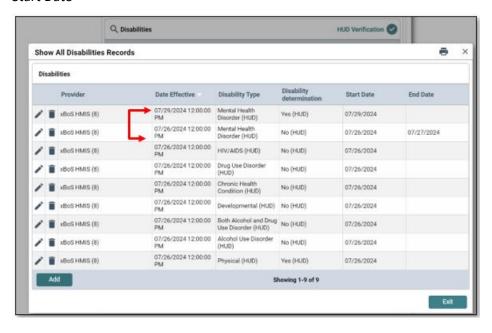
- o The End Date must be the date <u>before</u> the Start Date for the new response
- Click 'Save'
- To add the new/updated information click 'Add'



- Complete the information
  - o Make sure the Start Date is at least **1-day after** the End Date!



- Click 'Save'
- You will now see a row for the resource/disability type that has an End Date & a new row that has an 'open' Start Date



# **Completing an Annual Assessment**

Annual Assessments are to be completed no more than 30-days before or 30-days after the client's 'Anniversary Date' or 'Project Start Date'. The steps to compete an Annual Assessment are the same as 'Updating a Sub-Assessment' – except from the Entry/Exit tab, after clicking 'Interim' you will select type 'Annual Assessment'.

- Review all information
- Update as needed
- Click 'Save & Exit'