

# 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 Project Entry, Interim (Update &/or Annual assessments), and Project Exit. More information can be found on the HUD Exchange at <https://www.hudexchange.info/programs/hmis/>

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 must 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 Project Entry, HMIS will require the collection of PSDEs, along with the corresponding HUD Verification, in the clients HMIS record.

- **HUD Verifications** 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, you are verifying the client has reported either having or not having each resource or disability type listed in the sub-assessment.
  - To begin, answer the 'header question' for each HUD Verification.

Disability Type	Disability determination	Start Date *	End Date
<div style="text-align: right;">HUD Verification <span style="color: red;">▲</span></div>			

- 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 '**HUD Verification**', 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.

No (HUD)  
 Client doesn't know (HUD)  
 Client prefers not to answer (HUD)  
 Data not collected (HUD)  
 Incomplete

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

Select the Disability determination value for all incomplete Disability Type records

No (HUD)  
 Client doesn't know (HUD)  
 Client prefers not to answer (HUD)  
 Data not collected (HUD)  
 Incomplete

Disability Type	Disability determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client prefers not to answer (HUD)	Data not collected (HUD)	Incomplete
Alcohol Use Disorder (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Both Alcohol and Drug Use Disorder (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chronic Health Condition (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developmental (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drug Use Disorder (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HIV/AIDS (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mental Health Disorder (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit

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

Disabilities HUD Verification

Disability Type Disability determination Start Date \* End Date

Show All Disabilities Records

Provider	Date Effective	Disability Type	Disability determination	Start Date	End Date
xBoS HMIS (8)	07/30/2024 8:17:00 PM	Mental Health Disorder (HUD)	No (HUD)	07/30/2024	
xBoS HMIS (8)	07/30/2024 8:17:00 PM	HIV/AIDS (HUD)	No (HUD)	07/30/2024	
xBoS HMIS (8)	07/30/2024 8:17:00 PM	Drug Use Disorder (HUD)	No (HUD)	07/30/2024	
xBoS HMIS (8)	07/30/2024 8:17:00 PM	Developmental (HUD)	No (HUD)	07/30/2024	
xBoS HMIS (8)	07/30/2024 8:17:00 PM	Chronic Health Condition (HUD)	No (HUD)	07/30/2024	
xBoS HMIS (8)	07/30/2024 8:17:00 PM	Alcohol Use Disorder (HUD)	No (HUD)	07/30/2024	
xBoS HMIS (8)	07/30/2024 8:17:00 PM	Both Alcohol and Drug Use Disorder (HUD)	No (HUD)	07/30/2024	
xBoS HMIS (8)	07/30/2024 8:17:00 PM	Physical (HUD)	Yes (HUD)	07/30/2024	

Add Showing 1-8 of 8 Exit

- The **red exclamation point** indicates that not all of the HUD Verifications have not been completed

Disabilities HUD Verification

Disability Type Disability determination Start Date \* End Date

Add

- A **green check mark** indicates that all of the HUD Verifications have been completed

Does the client have a disabling condition? Yes (HUD)

Disabilities HUD Verification

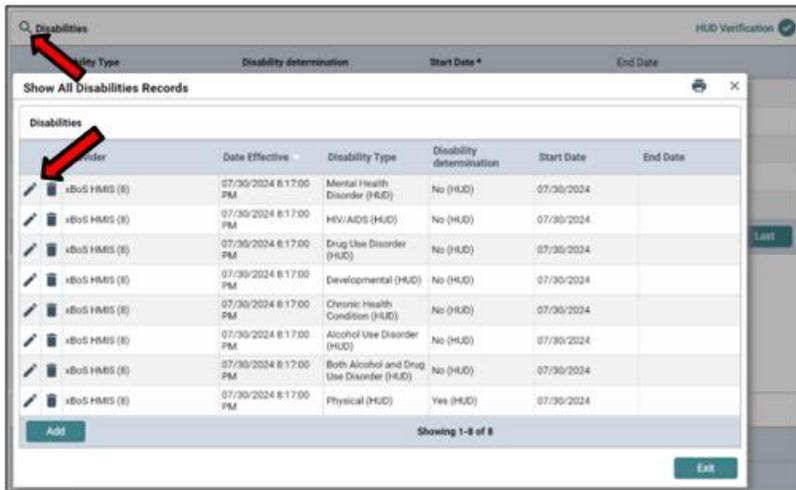
Disability Type *	Disability determination *	Start Date *	End Date
Chronic Health Condition (HUD)	No (HUD)	12/20/2022	
Mental Health Disorder (HUD)	Yes (HUD)	12/20/2022	
HIV/AIDS (HUD)	No (HUD)	08/12/2022	
Developmental (HUD)	No (HUD)	08/12/2022	
Drug Use Disorder (HUD)	No (HUD)	08/12/2022	

Add Showing 1-5 of 10 First Previous Next Last

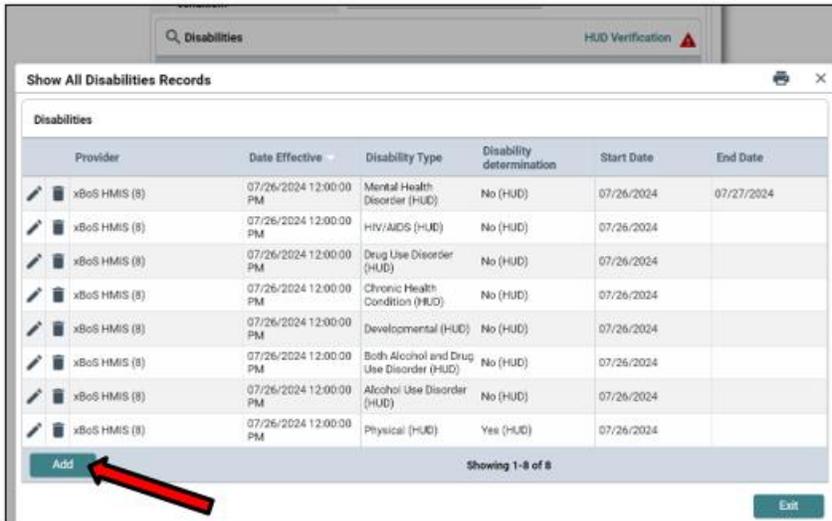
## Updating a Sub-Assessment

**NOTE: NEVER change or delete** previous responses!  
**END DATE** the previous response that is no longer true & then **ADD** the new / updated response

- From the Entry/Exit tab, click 'Interim' and select type 'Update'
- 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**
  - The End Date must be the date *before* the Start Date for the new response
- Click **'Save'**
- To add the new/updated information – click **'Add'**



- Complete the information
  - 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

Provider	Date Effective	Disability Type	Disability determination	Start Date	End Date
xBoS HMIS (8)	07/29/2024 12:00:00 PM	Mental Health Disorder (HUD)	Yes (HUD)	07/29/2024	
xBoS HMIS (8)	07/26/2024 12:00:00 PM	Mental Health Disorder (HUD)	No (HUD)	07/26/2024	07/27/2024
xBoS HMIS (8)	07/26/2024 12:00:00 PM	HIV/AIDS (HUD)	No (HUD)	07/26/2024	
xBoS HMIS (8)	07/26/2024 12:00:00 PM	Drug Use Disorder (HUD)	No (HUD)	07/26/2024	
xBoS HMIS (8)	07/26/2024 12:00:00 PM	Chronic Health Condition (HUD)	No (HUD)	07/26/2024	
xBoS HMIS (8)	07/26/2024 12:00:00 PM	Developmental (HUD)	No (HUD)	07/26/2024	
xBoS HMIS (8)	07/26/2024 12:00:00 PM	Both Alcohol and Drug Use Disorder (HUD)	No (HUD)	07/26/2024	
xBoS HMIS (8)	07/26/2024 12:00:00 PM	Alcohol Use Disorder (HUD)	No (HUD)	07/26/2024	
xBoS HMIS (8)	07/26/2024 12:00:00 PM	Physical (HUD)	Yes (HUD)	07/26/2024	

## 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 complete 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'