

# HMIS Workflow: HUD Verification & Sub-Assessments

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## HUD Verification Sub-Assessments 101

HMIS Data Standards require that *Program Specific Data Elements* (PSDE) data, which depicts client characteristics during each episode of homelessness, is collected for each individual episode of homelessness. The **HUD Verification sub-assessments** capture these client details in the four 'Common' PSDE categories listed below ([click here](#) for add'l details on PSDE's in the MD BoS HMIS Data Quality Plan) throughout each project enrollment on the *Entry – Interim – and Exit* assessments.

### 1. Disabilities \*Answer for all household members

- This sub-assessment has **8** individual types of disabilities that require a response

### 2. Health Insurance \*Answer for all household members

- This sub-assessment has **10** individual types of insurance that require a response

### 3. Monthly Income \*Answer for Head of Household & all Adults

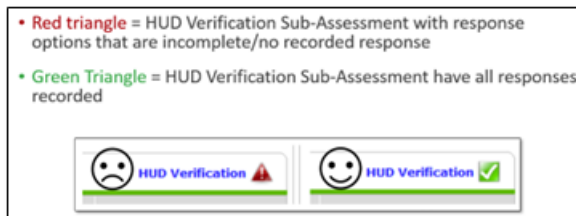
- This sub-assessment has **15** individual sources of income that require a response

### 4. Non-Cash Benefits \*Answer for Head of Household & all Adults

- This sub-assessment has **6** individual sources of benefits that require a response


✚ To be considered complete all 4 of the HUD Verifications **must have responses recorded** for the 'header question' and **each** of the individual types/sources listed within the sub-assessment

- **Red triangle** on the HUD Verifications indicates that at least one of the individual types/sources in the sub-assessment is missing a valid response - and will cause reporting errors!
- **Green check mark** indicates that all of the HUD Verification sub-assessment types/sources have a valid response



## Previously Recorded Responses

- Clients that have previous homeless service history in HMIS will have responses that were recorded during prior project enrollments
  - **Never assume** that the recorded responses are still accurate - Make sure to **always review** the accuracy of responses with the client upon entry into your project!
  - As the clients situation changed overtime, it is likely that their responses in the sub-assessments changed (*for example – the response for 'Earned Income' changed from NO to YES*) - resulting in multiple rows for each of the individual types/sources
- ✓ **HOWEVER** - each individual type/source **must have ONE** - and **only one** – response in the sub-assessment that is '**Open Ended**' (*i.e. w/o an End Date*) – which indicates the clients current situation

 **NOTE: NEVER** change or delete previous responses!

**END DATE** the previous response that is no longer true & then **ADD** the new / updated response

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

## When You SHOULD / SHOULD NOT Add a New Response

- ✓ Clients **without** previous homeless history / client record in HMIS
  - In this situation the project Entry assessment will not have any previously recorded responses; and
  - The End User creating the project enrollment will:
    - 'Start from scratch' - entering responses for the 4 HUD Verifications & each of the **individual types/sources** listed within the sub-assessments
- ✓ Clients **with** previous homeless history / client record in HMIS
  - In this situation client will have previously recorded responses on the HMIS Entry/Interim/Exit assessments
  - The End User creating the project enrollment will:
    - Review previous responses to the 4 HUD Verifications with the client to verify accuracy; *and*
    - **ONLY add** a new response to the HUD Verifications if any of the **individual types/sources** listed within the sub-assessment are **no longer accurate / true** to the clients current situation
      - ✚ If the client confirms that responses previously recorded are **still accurate** – the End User **does not** need to make any changes/updates

## HMIS Workflow for Completing HUD Verifications & Sub-Assessments

**HUD Verifications** are based on information provided by the client. The four sub-assessments identify which resources the client is **or** is not accessing & what disabilities the client reports as having **or** not having.

- ✚ Each individual type / source in the sub-assessment **must have ONE** - and **only one** - response that is 'Open Ended' (i.e. w/o an End Date)

### Project Entry - HUD Verifications & Sub-Assessments

#### ☑ Clients with previous homeless history / client record in HMIS

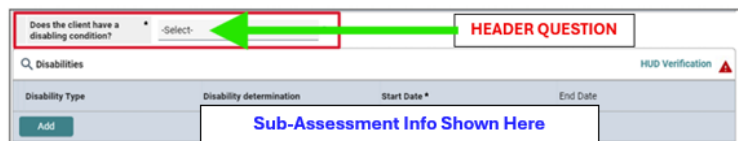
When a client has previously recorded responses on the HMIS Entry/Interim/Exit assessments, the End User creating the project enrollment needs to:

- ✓ Review previous responses to the 4 HUD Verifications with the client to verify accuracy; *and*
- ✓ **ONLY add** a new response to the HUD Verifications if any of the **individual types/sources** listed within the sub-assessment are **no longer accurate / true** to the clients current situation
  - If the client confirms that responses previously recorded are still accurate – the End User **does not** need to make any changes/updates

To review the previous responses, and if necessary update individual responses, start with **Step 2** in the section 'Updating HUD Verifications & Sub-Assessments'.

#### ○ Clients without previous homeless history / client record in HMIS

- At project enrollment, review / record response to the '**header question**' for each HUD Verification on the Entry Assessment



The screenshot shows a software interface for HUD Verifications. At the top, there is a dropdown menu labeled 'Does the client have a disabling condition?' with a red box around it and a green arrow pointing to a 'HEADER QUESTION' label. Below this is a table with columns for 'Disability Type', 'Disability determination', 'Start Date', and 'End Date'. A blue box labeled 'Sub-Assessment Info Shown Here' is positioned below the table. The text 'HUD Verification' is visible in the top right corner of the interface.

- ✚ This answer **must** correspond to answers recorded in the sub-assessment (example – if one response to an individual sources/types in the sub-assessment is 'Yes' - and all other responses are 'No' - then the 'header question' is also 'Yes', indicating the 1 current response of 'Yes')

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 response will pull as an **error** on reports)
- Next, click on 'HUD Verification' to open the sub-assessment
  - And record a response for each type / source
    - ✓ Every individual type / source in the sub-assessment **must have ONE** - and **only one** - response that is '**Open Ended**' (i.e. w/o an End Date)

HUD Verification: Disabilities

RED Triangle = Missing Information  
 GREEN Checkmark = All Sections Have Been Answered  
 \*\*Answer for ALL Household Members

Does the client have a disabling condition? Yes (HUD) 0

HUD Verification: Disabilities HUD Verification ✓

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 checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit

○ Review your work

- ✓ You can click on the magnifying glass to review the data you just entered, or review the history of HUD Verification responses

Disabilities HUD Verification ✓

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

😬 A red triangle on the HUD Verification indicates that that *at least one* of the individual types / sources **does not** have a current (i.e. 'Open Ended) response

Disabilities HUD Verification ⚠

Disability Type	Disability determination	Start Date *	End Date
Add			

😊 A green check mark indicates that all of the individual types / sources in the HUD Verification sub-assessment have current response

Does the client have a disabling condition? Yes (HUD) 0

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	

## Updating HUD Verifications & Sub-Assessments



**NOTE: NEVER** *change* or *delete* previous responses!

**END DATE** the previous response that is no longer true & then **ADD** the new / updated response

### 1. From the Entry/Exit tab

- Locate the project enrollment row that corresponds to the 'Enter Data As' (EDA) project selected upon logging in
- Click the '**Interim**' icon in the project row
- Click '**Add Interim Review**'
- Select the **Type**:
  - 'Update' is selected when documenting changes to information between project Entry/Exit
  - 'Annual' is selected when completing the required yearly assessment for clients still enrolled in the project

### 2. Go to the HUD Verification section that you are updating (*Disabilities, Health Ins., Monthly Income, Non-Cash Benefits*)

- If needed, update the '**header question**'
  - REMEMBER - this answer **must** correspond to answers recorded in the sub-assessment (*example – if one response to an individual sources/types in the sub-assessment is 'Yes' - and all other responses are 'No' - then the 'header question' is also 'Yes', indicating the 1 current response of 'Yes'*)

### 3. Click on the **magnifying glass** to view previously recorded responses

- **FIRST** - locate the row for the individual source/type that is **no longer accurate / true** to the clients current situation & needs to be End Dated
  - To enter the End Date - **click the pencil** next to the applicable individual source/type

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

- Add the **End Date**
  - ✓ The End Date **must be at least 1-day before** the Start Date for the new response that you will enter in the next step
  - **NEVER** change or delete previous responses! **ONLY** add the End Date to response that is no longer accurate / true
- Click '**Save**'

Monthly Income

Monthly Amount

Source of Income: Earned Income (HUD)

If Other, Please Specify

Receiving Income Source?: No

Notes on Medical Benefits

Start Date: 02/05/2024

End Date: 04/22/2024

Buttons: Print Assessment, Save, Cancel

- NEXT - **Record the new response** by clicking 'Add'

Disabilities

Provider	Date Effective	Disability Type	Disability determination	Start Date	End Date
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	

Buttons: Add, Exit

4. Complete the information for the new/updated response

- The **Start Date** for the new response **must be**:
  - Today's date (or - the date set if using 'Back Date Mode' - if the EU is not doing live data entry)
  - At least **1-day after** the End Date of the previous response

Add Recordset

Disabilities

Disability Type: Mental Health Disorder (HUD)

Disability determination: Yes (HUD)

If Yes, Expected to be of long continued and indefinite duration and substantially impairs ability to live independently: Yes (HUD)

Start Date: 07/29/2024

Note on Disability

Above condition is going to be long term? (Retired): -Select-

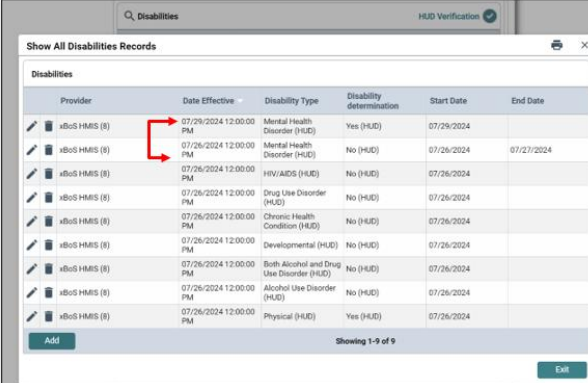
End Date

Buttons: Save, Cancel

5. Click 'Save'

## 6. Review your work

- If the workflow was completed correctly for the source / type that was just edited - you will see:
  - 1 row for the source / type that now has the **End Date** you just entered; *and*
  - 2<sup>nd</sup> row for the same source / type that is '**Open Ended**' (i.e. w/o an End Date) – indicating the clients current situation



Provider	Date Effective	Disability Type	Disability determination	Start Date	End Date
xBoS HMS (8)	07/29/2024 12:00:00 PM	Mental Health Disorder (HUD)	Yes (HUD)	07/29/2024	
xBoS HMS (8)	07/26/2024 12:00:00 PM	Mental Health Disorder (HUD)	No (HUD)	07/26/2024	07/27/2024
xBoS HMS (8)	07/26/2024 12:00:00 PM	HIV/AIDS (HUD)	No (HUD)	07/26/2024	
xBoS HMS (8)	07/26/2024 12:00:00 PM	Drug Use Disorder (HUD)	No (HUD)	07/26/2024	
xBoS HMS (8)	07/26/2024 12:00:00 PM	Chronic Health Condition (HUD)	No (HUD)	07/26/2024	
xBoS HMS (8)	07/26/2024 12:00:00 PM	Developmental (HUD)	No (HUD)	07/26/2024	
xBoS HMS (8)	07/26/2024 12:00:00 PM	Both Alcohol and Drug Use Disorder (HUD)	No (HUD)	07/26/2024	
xBoS HMS (8)	07/26/2024 12:00:00 PM	Alcohol Use Disorder (HUD)	No (HUD)	07/26/2024	
xBoS HMS (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' – **even if none of the client has changed!**

The steps to complete an Annual Assessment follow the instructions listed above in the 'Updating HUD Verifications & Sub-Assessments' section – except for the '**Interim - Type**' you will select 'Annual Assessment'.