













SUB-ASSESSMENTS & HOW TO UPDATE THEM

What is a Sub Assessment?

The Sub Assessments we are talking about in this context are the “HUD Verification Boxes” that you find within a program Entry/Exit/Interim Update. The example below shows the Sub Assessment for Disabling Conditions.

Does the client have any disabling condition? G

 If client has a disabling condition, click "Add" to add the type(s). HUD Verification 

	Disability Type	Disability determination	Start Date *	End Date
 	Physical (HUD)	No (HUD)	05/01/2023	
 	Mental Health Disorder (HUD)	No (HUD)	05/01/2023	
 	Drug Use Disorder (HUD)	No (HUD)	05/01/2023	
 	HIV/AIDS (HUD)	No (HUD)	05/01/2023	
 	Developmental (HUD)	No (HUD)	05/01/2023	

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When to Edit a Sub-Assessment

- You will find four sub assessments at every Entry, Interim, and Exit; these are disabling conditions, health insurance, income and noncash benefits. You will update them over time as they change by completing Interim updates. The goal is that over time while you work with clients you are helping them become stable by obtaining things like income, insurance, and food stamps. These are all things that you would then update in their open project entries and Coordinated Entry via an Interim update.
- These measures are important to update as they happen, even if they happen right before you exit someone from your project as housed. Every Spring we submit a report to HUD called the “System Performance Measures” and a large portion of the data for that report is pulled from these sub-assessments. HUD uses this data to measure how good of a job we are doing as a CoC at ending homelessness in our community. They determine this by measuring how often people are exiting project with income, insurance, food stamps and other supports. This does have a direct result on the funding we receive from HUD to better serve the unhoused people in our community.

Editing a Sub Assessment



Editing a sub assessment over time is done in a very specific way! This is to ensure it is accurately reflecting the changes in the data over time for your clients. This is one way we make our data look a little more two dimensional and tell our clients stories of progress.



This will take practice before it feels like it makes sense! Please utilize the training site to practice this process if you need to!



The next couple of slides will walk you through exactly how to edit a sub assessment, we are going to practice editing income but note that you would edit any of the other sub assessments the same way.

In this example we are going to pretend that we have been working with our client for about two and a half months. When he entered our project he had no income, but after providing some resources and support they have successfully obtained a job and called us to report their first paycheck was \$150. We are going to update their income by completing an Interim update, which you can see highlighted below

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Coordinated Entry: Nashville-Davidson County (CE) (411)	Standard	05/01/2023				

Add Entry / Exit Showing 1-1 of 1

We are going to start by changing the **No** at the top of the sub assessment to a **Yes** now that our client is receiving Income, and we will plug in an estimated monthly income.

Income from Any Source? G

Total Monthly Income: G

If client is receiving cash income, click "Add" to add the source(s) and amount(s). HUD Verification

Source of Income	Receiving Income Source?	Monthly Amount	Start Date*	End Date
Worker's Compensation (HUD)	No		05/01/2023	
VA Service Connected Disability Compensation (HUD)	No		05/01/2023	
VA Non-Service Connected Disability Pension (HUD)	No		05/01/2023	
Unemployment Insurance (HUD)	No		05/01/2023	
SSDI (HUD)	No		05/01/2023	

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



Income from Any Source? G

Total Monthly Income: G

If client is receiving cash income, click "Add" to add the source(s) and amount(s). HUD Verification


Source of Income	Receiving Income Source?	Monthly Amount	Start Date*	End Date
Worker's Compensation (HUD)	No		05/01/2023	
VA Service Connected Disability Compensation (HUD)	No		05/01/2023	
VA Non-Service Connected Disability Pension (HUD)	No		05/01/2023	
Unemployment Insurance (HUD)	No		05/01/2023	
SSDI (HUD)	No		05/01/2023	











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

After noting the change in the top of the sub assessment, we now need to find the type of income that our client now receives so we can edit it. In this case, our client is working and is earning income. So, we are looking for the **Earned Income** line and click the pencil next to the source of income we need to edit

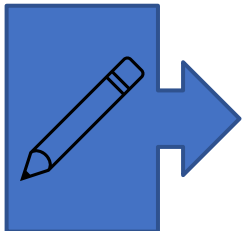
Income from Any Source? Yes (HUD) No **G**

Total Monthly Income: **G**

 **If client is receiving cash income, click "Add" to add the source(s) and amount(s).** **HUD Verification**



	Source of Income	Receiving Income Source?	Monthly Amount	Start Date *	End Date
 	General Assistance (HUD)	No		05/01/2023	
 	Other (HUD)	No		05/01/2023	
 	Child Support (HUD)	No		05/01/2023	
 	Alimony or Other Spousal Support (HUD)	No		05/01/2023	
 	Earned Income (HUD)	No		05/01/2023	











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These are your navigation buttons within the sub assessments!

Edit Recordset - (129) Flinstone, Fred



If client is receiving cash income, click "Add" to add the source(s) and amount(s).  











Source of Income	Earned Income (HUD) 
If Other, Please Specify	<div style="border: 1px solid gray; width: 100%; height: 100%;"></div> 
Receiving Income Source?	No 
Monthly Amount	<input type="text"/> 
Start Date *	05 / 01 / 2023   
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   

This is where a lot of people mess up! Most are tempted to just change the **No** to a **Yes** and call it a day. But this is not how we correctly note a change in a sub assessment. Instead what we should we do is add an End Date to this Earned Income that is a No. So the End Date will be the day before you get the news from your client that this has changed. In this case, we are going to end date for 7/13/23.

Income from Any Source? Yes (HUD) No (HUD) G

Total Monthly Income: G

 If client is receiving cash income, click "Add" to add the source(s) and amount(s). HUD Verification 







	Source of Income	Receiving Income Source?	Monthly Amount	Start Date *	End Date
 	General Assistance (HUD)	No		05/01/2023	
 	Other (HUD)	No		05/01/2023	
 	Child Support (HUD)	No		05/01/2023	
 	Alimony or Other Spousal Support (HUD)	No		05/01/2023	
 	Earned Income (HUD)	No		05/01/2023	07/13/2023

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Now you can see that the Earned Income has an End Date for that line, and HUD Verification is now showing an Error at the top. The last step is adding a new line for Earned Income noting the change to a **Yes** and the new start date of 7/14/23.

Add Recordset - (129) Flinstone, Fred

If client is receiving cash income, click "Add" to add the source(s) and amount(s).


Source of Income	Earned Income (HUD) G
If Other, Please Specify	<div style="border: 1px solid gray; height: 150px; width: 100%;"></div> G
Receiving Income Source?	Yes G
Monthly Amount	150 G
Start Date *	07 / 14 / 2023    G
End Date	/ /    G











Save Save and Add Another Cancel

Now using the Add button on our sub assessment, we can add the new source of income being the Earned Income as a **Yes** starting on 7/14/23. The example above would show exactly what you should have filled out!

Income from Any Source? Yes (HUD) No **G**

Total Monthly Income: **G**

 **If client is receiving cash income, click "Add" to add the source(s) and amount(s).** **HUD Verification**

	Source of Income	Receiving Income Source?	Monthly Amount	Start Date *	End Date
 	Earned Income (HUD)	Yes	US\$150.00	07/14/2023	
 	Worker's Compensation (HUD)	No		05/01/2023	
 	VA Service Connected Disability Compensation (HUD)	No		05/01/2023	
 	VA Non-Service Connected Disability Pension (HUD)	No		05/01/2023	
 	Unemployment Insurance (HUD)	No		05/01/2023	

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After hitting Save and Exit button you can navigate back out to the first page within the sub assessment and see the new income listed! You will also notice that your HUD Verification error should have resolved itself as well.

Don't forget...

In this example, we practiced changing an income but any change in any of the sub assessments (disabling conditions, insurance, income and noncash benefits) would be noted the same way.

Any change in the sub assessment data is cause for an Interim update, this is important information to keep updated for your clients as close to real time as you can.

You will never go back into the Entry Assessment and change these things; we use this process to show progress **over time** through the Interim Updates.