

WHEN (AND WHAT) CAN I UPDATE? SUB-ASSESSMENT INFORMATION EDITION

WHAT PIECES OF SUB ASSESSMENT INFORMATION CAN I UPDATE?

There are a few times when you should feel free to make the update to a client's information in a sub-assessment. Examples are included:

WHEN THE INFORMATION IS NO LONGER TRUE

1. You can add an end date to the line item of the sub-assessment and a new sub-assessment line should be added.
2. Example:
 - a. This client is entered on 1/11/18 into the program and through talking to the client we discover that the client no longer is receiving the Earned Income of \$250 that was started on 12/11/17 they are now making \$500

| Monthly Income (HUD) | | | | | HUD Verification <input checked="" type="checkbox"/> |
|----------------------|--------------|---|--|----------------|--|
| | Start Date * | Source of Income | End Date (record ONLY if income changes or ends) | Monthly Amount | Receiving Income Source? |
| | 12/11/2017 | Earned Income (HUD) | | US\$250.00 | Yes |
| | 10/01/2017 | General Assistance (HUD) | | | Yes |
| | 10/01/2017 | Pension or retirement income from another job (HUD) | | | No |
| | 10/01/2017 | VA Non-Service Connected Disability Pension (HUD) | | | No |
| | 10/01/2017 | Private Disability Insurance (HUD) | | | No |

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You would update the line that says they were making \$250 by adding the day before the entry date to your program in the End Date

Edit Recordset - (1) Test, Client A

Monthly Income (HUD)

Record monthly income at entry
Update records ONLY if income has changed

| | |
|--|---------------------|
| Start Date * | 12 / 11 / 2017 |
| Source of Income | Earned Income (HUD) |
| If Other, Please Specify | |
| End Date (record ONLY if income changes or ends) | 01 / 11 / 2018 |
| Monthly Amount | 250 |
| Receiving Income Source? | Yes |

Print Recordset Save Save and Add Another Cancel

and then create a new line for the \$500 they now make with a start date the same day as program start date.

Add Recordset - (1) Test, Client A

Monthly Income (HUD)

Record monthly income at entry
Update records ONLY if income has changed

| | |
|--|---------------------|
| Start Date * | 01 / 11 / 2018 |
| Source of Income | Earned Income (HUD) |
| If Other, Please Specify | |
| End Date (record ONLY if income changes or ends) | |
| Monthly Amount | 500 |
| Receiving Income Source? | Yes |

Save Save and Add Another Cancel

3. Where do you make the change?
 - a. In your entry/exit – this way you have the correct effective date and this does not cause issues with old information, and it will still pull into your entry/exit.
4. Who will this affect?
 - a. This will affect all people who use the client’s file – as of the end date and new line’s start date.

IF THERE IS A DUPLICATE LINE FOR A SUB-ASSESSMENT

1. You can delete one of the duplicates you created
2. Example:

| Monthly Income (HUD) | | | | | HUD Verification |
|----------------------|---|--|----------------|--------------------------|------------------|
| Start Date * | Source of Income | End Date (record ONLY if income changes or ends) | Monthly Amount | Receiving Income Source? | |
| 01/11/2018 | Earned Income (HUD) | | US\$500.00 | Yes | |
| 01/11/2018 | Earned Income (HUD) | | US\$500.00 | Yes | |
| 12/11/2017 | Earned Income (HUD) | 01/11/2018 | US\$250.00 | Yes | |
| 10/01/2017 | General Assistance (HUD) | | | Yes | |
| 10/01/2017 | Pension or retirement income from another job (HUD) | | | No | |

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3. Where do you make the change?
 - a. You can make the change either in your entry/exit or in the assessment tab.
4. Who will this affect?
 - a. This will affect all people who work with the client either at the same time or after the date you created the duplicate line. In this case any agency that works with the client on or after 1/11/18 would have seen your duplicate and once you delete the duplicate the issue will be resolved for all those that served the client on or after 1/11/18.
 - b. You are only able to delete a duplicate line if you are EDA'd to the provider that created the line.

WHAT PIECES OF SUB ASSESSMENT INFORMATION SHOULD I NOT UPDATE?

There is some information in sub-assessments that you should (almost) never change)

RECEIVING INCOME? YES/NO QUESTION

You should not change the yes/no answer within a sub-assessment line. If an answer is no longer true, you add an end date for the information and then add a new line with the new information.

Edit Recordset - (1) Test, Client A

Monthly Income (HUD)

Record monthly income at entry
Update records ONLY if income has changed

| | |
|--|---------------------|
| Start Date * | 12 / 11 / 2017 |
| Source of Income | Earned Income (HUD) |
| If Other, Please Specify | |
| End Date (record ONLY if income changes or ends) | 01 / 11 / 2018 |
| Monthly Amount | 250 |
| Receiving Income Source? | Yes |

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ALREADY EXISTING LINES IN A SUB-ASSESSMENT

The only piece that you should change in an already existing sub-assessment line (especially one that was not created by your agency) is the End Date

Edit Recordset - (1) Test, Client A

Monthly Income (HUD)

Record monthly income at entry
Update records ONLY if income has changed

| | |
|--|---------------------|
| Start Date* | 12 / 11 / 2017 |
| Source of Income | Earned Income (HUD) |
| If Other, Please Specify | |
| End Date (record ONLY if income changes or ends) | 01 / 11 / 2018 |
| Monthly Amount | 250 |
| Receiving Income Source? | Yes |

Print Recordset Save Save and Add Another Cancel

THINGS THAT ARE A LITTLE BIT MORE TRICKY

There are some things that take a bit more communication and work to make sure things are correct for all people working in the client's file.

WHEN THE INFORMATION YOU HAVE IS DIFFERENT THAN THE INFORMATION ANOTHER AGENCY HAS

If a client is being served by 2 agencies at the same time, and the information given to you by the client is not the same as what was given to the other agency, the two agencies need to work together to find the most accurate information and then only keep the most correct information.

The end goal is to have good data in client records which help with Coordinated Entry and ultimately with helping clients get and stay housed. Being a good neighbor and working together when there are discrepancies or errors help our clients move through their housing crisis and into stable housing more quickly.