

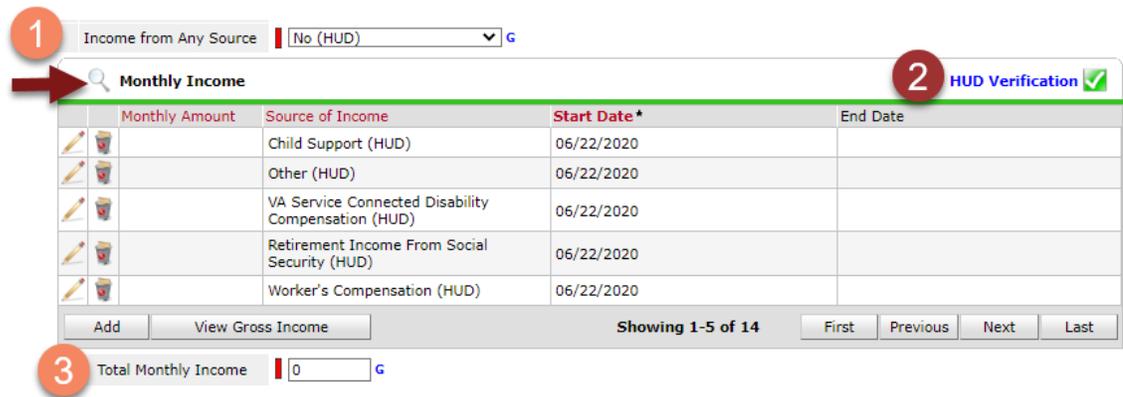
DE-CMIS GUIDANCE: HOW TO UPDATE SUB-ASSESSMENTS

INTRODUCTION. This guide outlines how CMIS end users can **update sub-assessments**. **HUD Verification** is another term used for this. Sub-assessments are in entry assessments for the following data elements:

- Income
- Non-cash benefits
- Health insurance
- Disabilities

1. A two-step process must be followed when entering or updating a data element with a sub-assessment.

1. Must select “Yes” or “No” to if the client has the item in question.
2. Select the **HUD Verification** to continue.
3. *Income only* – must type the Total Monthly Income that was entered in the HUD Verification.



The screenshot shows the HUD Verification interface. At the top, there is a dropdown menu for 'Income from Any Source' set to 'No (HUD)'. Below this is a search bar for 'Monthly Income'. To the right, there is a 'HUD Verification' status with a green checkmark. The main part of the interface is a table with the following columns: 'Monthly Amount', 'Source of Income', 'Start Date*', and 'End Date'. The table contains five rows of income sources, each with a trash can icon in the 'Monthly Amount' column. At the bottom, there is a 'Total Monthly Income' field set to '0' and a 'Showing 1-5 of 14' indicator.

Monthly Amount	Source of Income	Start Date*	End Date
	Child Support (HUD)	06/22/2020	
	Other (HUD)	06/22/2020	
	VA Service Connected Disability Compensation (HUD)	06/22/2020	
	Retirement Income From Social Security (HUD)	06/22/2020	
	Worker's Compensation (HUD)	06/22/2020	

Total Monthly Income: 0

2. **In the HUD Verification**, ensure that the table matches the previously-answered Yes/No question. For any client who answered “Yes” on the entry assessment, at least one row in the sub-assessment must be answered “Yes”.

1. If the response for any row is “Incomplete”, use the “No” option from above to autofill these blanks.
2. Manually change any response to a row to “Yes” if the field applies to the client. For *income only*, you will then be prompted to type in the Monthly Amount that the client receives from that source.

HUD Verification: Monthly Income for 09/22/2022

i Per Source of Income, the current records for Monthly Income as of 09/22/2022 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 09/22/2022, records containing "Yes" values will be displayed and take precedence for reporting purposes.

1 Select the Receiving Income Source? value for all incomplete Source of Income records

- No
- [Data Not Collected](#)
- [Incomplete](#)

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

- If there is previously-saved information in the sub-assessment and any source needs to be updated, click the pencil icon for the corresponding source. Do not change the response (Yes/No) immediately.

HUD Verification: Monthly Income for 09/22/2022 ← ENTRY DATE

i Per Source of Income, the current records for Monthly Income as of 09/22/2022 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 09/22/2022, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. Add an **End Date** and Save. This date should be the day before the Project Start Date (also known as the entry date).

5. The source should now have the response of "Incomplete" on the sub-assessment. Select the applicable answer for the client as of entry.

HUD Verification: Monthly Income for 09/22/2022

Per Source of Income, the current records for Monthly Income as of 09/22/2022 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 09/22/2022, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records

No
 Data Not Collected
 Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit

6. If "Yes" is selected, a pop-up window will appear. Enter the new Monthly Amount for this income source.

- Monthly Amount will only be automatically asked for the income sub-assessment.

The screenshot shows a dialog box titled "Add Recordset" with a sub-header "Monthly Income". The "Monthly Amount" field is highlighted with a red box. Below it, the "Source of Income" is set to "Earned Income (HUD)". There is a text area for "If Other, Please Specify". The "Receiving Income Source?" field is set to "Yes". There is an "Additional Comment" text area. The "Start Date" is set to 09/22/2022, and the "End Date" is empty. "Save" and "Cancel" buttons are at the bottom.

- For the **non-cash benefits** sub-assessment, the monthly amount can be added after saving the Yes/No response.
 1. Click on the pencil sign to open sub-assessment.
 2. Enter the monthly amount received.
 3. Save and exit.

The screenshot shows the "Non-Cash Benefits" sub-assessment interface. The "HUD Verification: Non-Cash Benefits for 09/22/2022" window is open. The "Edit Recordset - (1) Parker, Peter" dialog box is also open, showing the "Non-Cash Benefits" sub-assessment. The "Source of Non-Cash Benefit" is set to "Supplemental Nutrition Assistance Program (Food Stamps) (HUD)". The "Receiving Benefit?" field is set to "Yes". The "Start Date" is set to 09/22/2022, and the "End Date" is empty. The "Amount of Non-Cash Benefit" field is empty. Red circles with numbers 1, 2, and 3 are overlaid on the interface to indicate the steps: 1. Click on the pencil sign to open sub-assessment. 2. Enter the monthly amount received. 3. Save and exit.

- For the **disabilities** sub-assessment, two fields must be updated:
 1. Is the client's disability expected to be long-continued/indefinite and impairs their ability to live independently? (Yes/No)

2. NOTE ON DISABILITY (Text box): Provide notes about the client's disability, if needed.

Add Recordset

Disabilities

Disability Type	Mental Health Disorder (HUD)
Disability determination	Yes (HUD)
1 If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	-Select- G
2 Start Date*	09 / 22 / 2022 G
Note on Disability	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div> G
Above condition is going to be long term? (Retired)	-Select- G
End Date	/ / G

Save Cancel

7. Double-check that all parts of the two- or three-step process for each data element match in their responses.