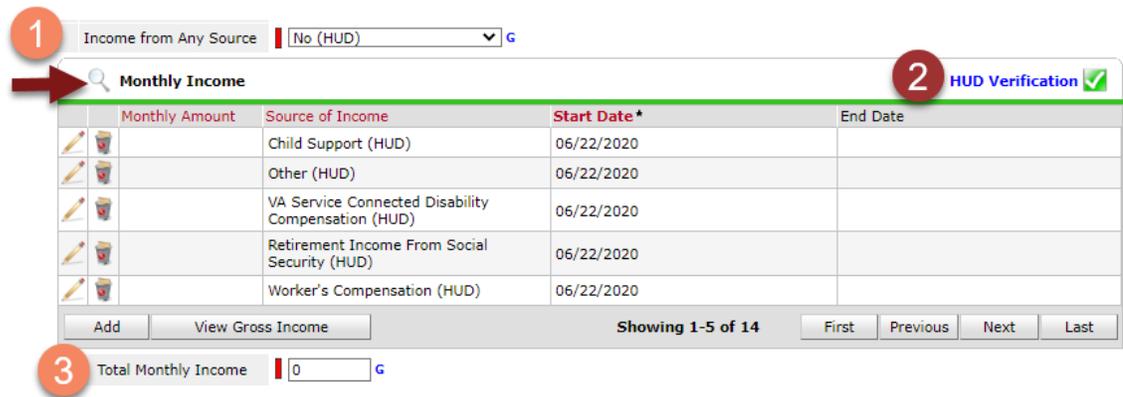# HOUSING ALLIANCE DELAWARE

# 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.



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**

ⓘ 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) | ○ | ⦿ | ○ | ○ |
| Earned Income (HUD) | ○ | ⦿ | ○ | ○ |
| Pension or retirement income from another job (HUD) | ○ | ⦿ | ○ | ○ |
| Private Disability Insurance (HUD) | ○ | ⦿ | ○ | ○ |
| VA Non-Service Connected Disability Pension (HUD) | ○ | ⦿ | ○ | ○ |
| Unemployment Insurance (HUD) | ○ | ⦿ | ○ | ○ |
| SSDI (HUD) | ○ | ⦿ | ○ | ○ |
| SSI (HUD) | ○ | ⦿ | ○ | ○ |
| Worker's Compensation (HUD) | ○ | ⦿ | ○ | ○ |
| TANF (HUD) | ○ | ⦿ | ○ | ○ |
| VA Service Connected Disability Compensation (HUD) | ○ | ⦿ | ○ | ○ |
| Retirement Income From Social Security (HUD) | ○ | ⦿ | ○ | ○ |
| Other (HUD) | ○ | ⦿ | ○ | ○ |
| Child Support (HUD) | ○ | ⦿ | ○ | ○ |

[ Save ] [ Save & Exit ] [ Exit ]

3. 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**

ⓘ 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) | ○ | ⦿ | ○ | ○ |
| Earned Income (HUD) | ○ | ⦿ | ○ | ○ |
| Pension or retirement income from another job (HUD) | ○ | ⦿ | ○ | ○ |
| Private Disability Insurance (HUD) | ○ | ⦿ | ○ | ○ |
| VA Non-Service Connected Disability Pension (HUD) | ○ | ⦿ | ○ | ○ |
| Unemployment Insurance (HUD) | ○ | ⦿ | ○ | ○ |
| SSDI (HUD) | ○ | ⦿ | ○ | ○ |
| SSI (HUD) | ○ | ⦿ | ○ | ○ |
| Worker's Compensation (HUD) | ○ | ⦿ | ○ | ○ |
| TANF (HUD) | ○ | ⦿ | ○ | ○ |
| VA Service Connected Disability Compensation (HUD) | ○ | ⦿ | ○ | ○ |
| Retirement Income From Social Security (HUD) | ○ | ⦿ | ○ | ○ |
| Other (HUD) | ○ | ⦿ | ○ | ○ |
| Child Support (HUD) | ○ | ⦿ | ○ | ○ |

[ Save ] [ Save & Exit ] [ Exit ]

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.



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.



- 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.



- 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.



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