
HMIS Support Manual - Correcting Income Errors In HMIS

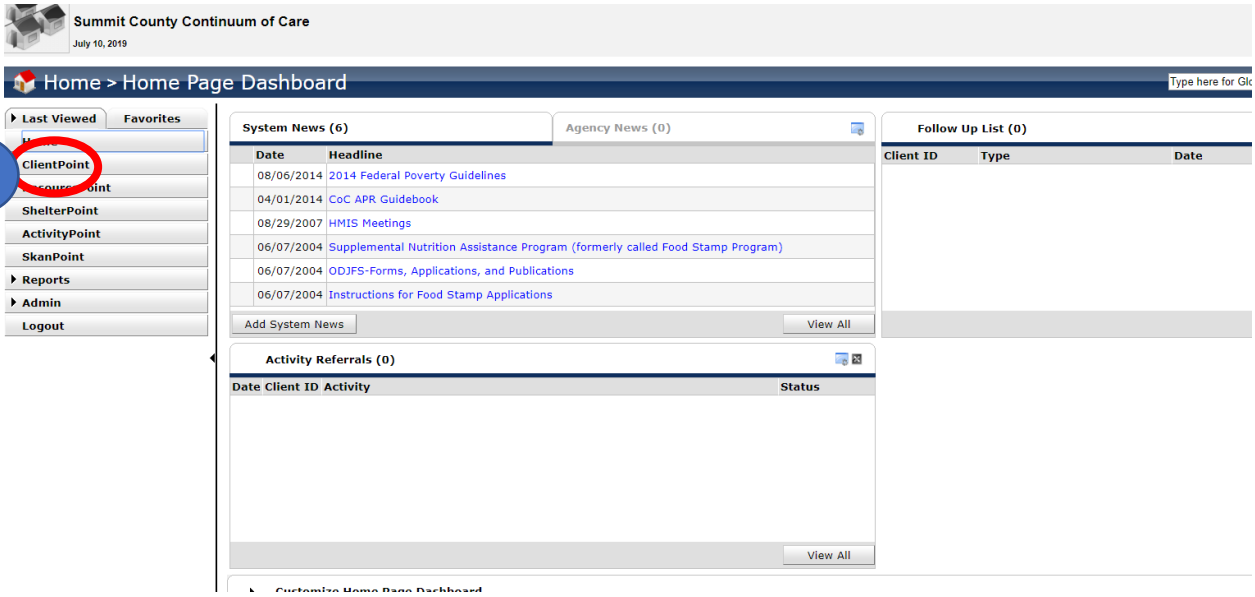


**Summit County, Ohio
Homeless Management Information System**

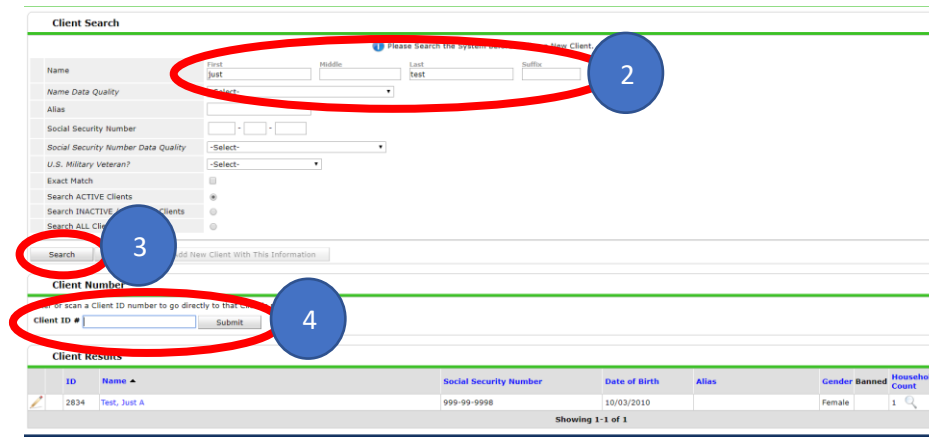


CORRECTING INCOME ERRORS IN HMIS

1. Open **ServicePoint** and click on the **ClientPoint** tab on the left-hand side of the **Home Page Dashboard**:



2. Enter Client search information by one of the following methods:
 - a. The Client's First & Last Name (First Name: **Just** - Last Name: **Test**)
 - b. A partial Client name search
 - For example, we can enter partial Client Name information of "Ju" for the First Name and "Te" for the Last Name
3. Click **[Search]**
4. A Client search may also be conducted by entering the **Client ID #** and then clicking **[Submit]**



CORRECTING INCOME ERRORS IN HMIS

- Once the Client has been found in the database, click on the **Entry/Exit** tab:

Client - (2834) Test, Just A

(2834) Test, Just A

Release of Information: None

Client Information

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Measurements Assessments

Added to the system 09/13/2006 12:23 PM

Name	Test, Just A	Gender	Female
Date of Birth	10/03/2010 (Age 8)	Primary Race	Native Hawaiian or Other Pacific Islander (HUD)
Social Security	999-99-9998	Secondary Race	American Indian or Alaska Native (HUD)
		U.S. Military Veteran?	No (HUD)

Provider	Permission	Start Date	End Date
Transitions to Independence (Harmony House)	Yes	06/18/2019	06/18/2020
Homeless Prevention (CANAPI)	Yes	06/06/2019	06/06/2020
Harmony Place (CAN)	Yes	06/06/2019	06/06/2020
SSVF Homeless Prevention (CSS)	Yes	03/26/2019	03/26/2020
Home Again	Yes	03/14/2019	03/14/2020
Home Again	Yes	03/14/2019	03/14/2020

Program	Type	Project Start Date	Exit Date
Transitions to Independence (Harmony House)	HUD	07/01/2019	07/01/2019
PATH Supportive Services Only (CSS)	PATH	06/19/2019	
PATH Street Outreach Program (CSS)	PATH	06/19/2019	
Transitions to Independence (Harmony House)	HUD	06/18/2019	06/19/2019
Helping Hands (CANAPI)	HUD	06/06/2019	06/06/2019

- Locate the **Provider Entry or Exit** to be edited
- Click the appropriate **[Pencil]** (i.e., the **Edit icon**) to begin editing the Client's Entry and/or Exit
 - If the error is indicated at the **start** of a Client's project, click the pencil next to the **Project Start Date**.
 - If the error is indicated at the **exit** of a Client's project, click the pencil next to the **Exit Date**.
 - For this example, we will click the pencil next to the **Project Start Date (7a)**.

Client Information

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Measurements Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Transitions to Independence (Harmony House) (201)	HUD	07/01/2019				
PATH Supportive Services Only (CSS) (149)	PATH	06/19/2019				
PATH Street Outreach Program (CSS) (26)	PATH	06/19/2019				
Transitions to Independence (Harmony House) (201)	HUD	06/18/2019	06/19/2019			
Helping Hands (CANAPI) (139)	HUD	06/06/2019	06/06/2019			
Harmony Place (CAN) (20)	HUD	06/06/2019	06/06/2019			
Central Intake (UWSC) (144)	HUD	04/24/2019	04/24/2019			
Commons at Madaline Park (CSS) (126)	HUD	03/29/2018	06/26/2019			

CORRECTING INCOME ERRORS IN HMIS

8. This screen will appear
 - a. Click **[Save and Continue]**:

Household Members

No Household Members were originally associated.

Include Additional Household Members

Edit Project Start Data - (2834) Test, Just A

Provider	Transitions to Independence (Harmony House) (201)
Type	HUD
Project Start Date *	07 / 01 / 2019 1 : 51 : 32 PM

Save & Continue Cancel

Program (CSS) (26) PATH 06/19/2019

9. To see the entire income and income source history for this Client, please click the **[magnifying glass] icon** next to **“Monthly Income”**
 - a. If the client **is not** receiving any income, make sure the drop-down box next to **“Income from Any Source”** dropdown is marked **“No”**
 - b. If the client **is** receiving income, make sure the drop-down box next to **“Income from Any Source”** dropdown is marked **“Yes”**

Income from Any Source No (HUD)

9a & 9b

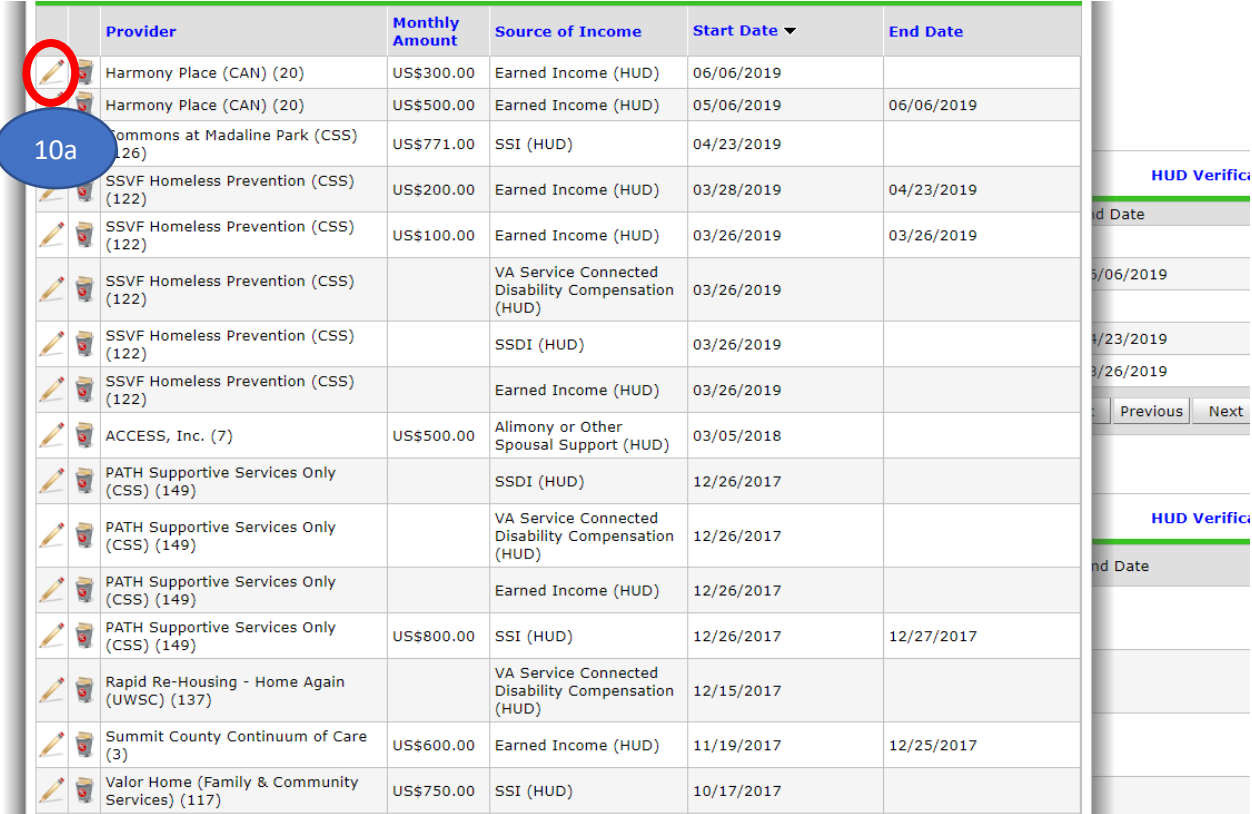
9 Monthly Income HUD Verification
















Monthly Amount	Source of Income	Start Date *	End Date
US\$300.00	Earned Income (HUD)	06/06/2019	
US\$500.00	Earned Income (HUD)	05/06/2019	06/06/2019
US\$771.00	SSI (HUD)	04/23/2019	
US\$200.00	Earned Income (HUD)	03/28/2019	04/23/2019
US\$100.00	Earned Income (HUD)	03/26/2019	03/26/2019

Add View Gross Income Showing 1-5 of 41 First Previous Next Last

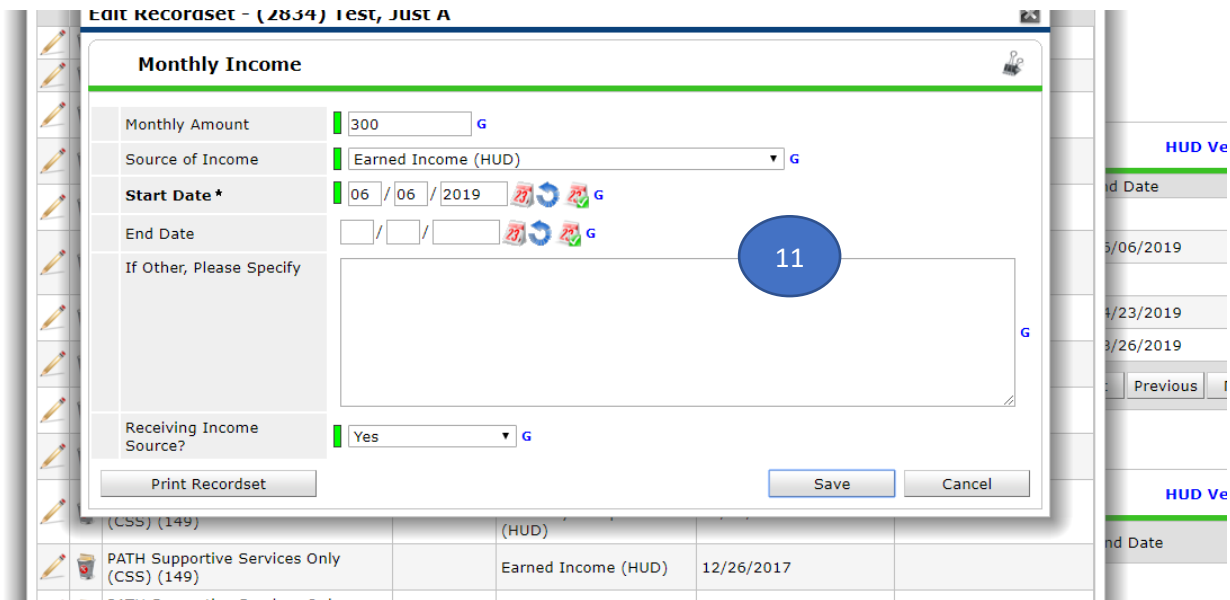
CORRECTING INCOME ERRORS IN HMIS

10. To edit an income entry, click the pencil before the entry you need to edit.
 - a. For this example, we will edit the Harmony Place income with a start date of 6/6/2019:



	Provider	Monthly Amount	Source of Income	Start Date	End Date
	Harmony Place (CAN) (20)	US\$300.00	Earned Income (HUD)	06/06/2019	
	Harmony Place (CAN) (20)	US\$500.00	Earned Income (HUD)	05/06/2019	06/06/2019
	Commons at Madaline Park (CSS) (126)	US\$771.00	SSI (HUD)	04/23/2019	
	SSVF Homeless Prevention (CSS) (122)	US\$200.00	Earned Income (HUD)	03/28/2019	04/23/2019
	SSVF Homeless Prevention (CSS) (122)	US\$100.00	Earned Income (HUD)	03/26/2019	03/26/2019
	SSVF Homeless Prevention (CSS) (122)		VA Service Connected Disability Compensation (HUD)	03/26/2019	
	SSVF Homeless Prevention (CSS) (122)		SSDI (HUD)	03/26/2019	
	SSVF Homeless Prevention (CSS) (122)		Earned Income (HUD)	03/26/2019	
	ACCESS, Inc. (7)	US\$500.00	Alimony or Other Spousal Support (HUD)	03/05/2018	
	PATH Supportive Services Only (CSS) (149)		SSDI (HUD)	12/26/2017	
	PATH Supportive Services Only (CSS) (149)		VA Service Connected Disability Compensation (HUD)	12/26/2017	
	PATH Supportive Services Only (CSS) (149)		Earned Income (HUD)	12/26/2017	
	PATH Supportive Services Only (CSS) (149)	US\$800.00	SSI (HUD)	12/26/2017	12/27/2017
	Rapid Re-Housing - Home Again (UWSC) (137)		VA Service Connected Disability Compensation (HUD)	12/15/2017	
	Summit County Continuum of Care (3)	US\$600.00	Earned Income (HUD)	11/19/2017	12/25/2017
	Valor Home (Family & Community Services) (117)	US\$750.00	SSI (HUD)	10/17/2017	

11. After clicking the pencil, there will be a **Monthly Income** pop-up window:



Monthly Income

Monthly Amount: G

Source of Income: G

Start Date *: / / G

End Date: / / G

If Other, Please Specify: G

Receiving Income Source?: G

Print Recordset Save Cancel

CORRECTING INCOME ERRORS IN HMIS

12. In this window there are a few important things to note:

The screenshot shows the 'Monthly Income' entry form in the HMIS system. The form is titled 'Monthly Income' and contains several fields: 'Monthly Amount' (300), 'Source of Income' (Earned Income (HUD)), 'Start Date' (06/06/2019), 'End Date' (empty), 'If Other, Please Specify' (empty), and 'Receiving Income Source?' (Yes). The 'Save' button is circled in red, and a blue circle with '12' is placed over the 'End Date' field. Another blue circle with '12f' is placed over the 'Save' button. The background shows a table with columns for 'PATH Supportive Services Only (CSS) (149)', 'Earned Income (HUD)', and '12/26/2017'.

- The **Monthly Income** amount is entered (in this case, **\$300**)
- The **Source of Income** is indicated (in this case, **Earned Income (HUD)**). **PLEASE NOTE:** Any income source option must end with the **(HUD)** suffix to be an acceptable income source for your program
- The income **Start Date** is indicated (in this case, **06/06/2019**)
- No end date is indicated because the Client is still receiving this income as of the date of this entry
 - Please remember to make sure all income sources are properly ended when appropriate
- Receiving Income Source?** is always to receive a **“Yes”** response if the Client is receiving income or was receiving income from this source at some time (please see image 13a below)
- Please be sure to click [**Save**] to add this income record to the Client’s file
- PLEASE NOTE:** If the Client receives income from the same source (i.e., **Earned Income**), but there’s an increase or decrease in that income, **the previous income entry must be ended and a new income entry must be created to reflect the income change**
 - Please remember: DO NOT EDIT AN EXISTING INCOME ENTRY TO REFLECT A CHANGE IN INCOME – CREATE A NEW ENTRY!!**
 - Changes in income are reflected by new income entries

CORRECTING INCOME ERRORS IN HMIS

➤ Income entries should only be edited when an error has been made in entering that specific income entry

h. Income start and end dates **must not overlap**

- If they do, this will create an error on this project’s monthly **DQFR (Data Quality Framework Report)**
- To avoid this, please be sure to end a prior income at least one day before entering a new income of the same type (i.e., **Earned Income**)
- The example below may create an error on the DQFR because the two Earned Incomes entered for Harmony Place ended and started on the same date
 - To avoid potential DQFR errors, the Earned Income with the start date of 05/06/2019 should have been ended on 06/05/2019 so the new Earned Income could begin on its proper date of 06/06/2019:

Provider	Monthly Amount	Source of Income	Start Date	End Date
Harmony Place (CAN) (20)	US\$300.00	Earned Income (HUD)	06/06/2019	
Harmony Place (CAN) (20)	US\$500.00	Earned Income (HUD)	05/06/2019	06/06/2019

13. When ending income, simply enter the **End Date** for the income and click **[Save]** to add the new information to the Client’s record

- a. Please note that the **Receiving Income Source?** question remains a **“Yes”** response, even though the income has ended

Monthly Income

Monthly Amount: 300 G

Source of Income: Earned Income (HUD) G

Start Date*: 06 / 06 / 2019 G

End Date: 12 / 12 / 2020 13

If Other, Please Specify: G

Receiving Income Source? Yes 13a G

Print Recordset Save Cancel

CORRECTING INCOME ERRORS IN HMIS

I hope you found this manual helpful. 😊 Please feel free to reach out to me with any questions:

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