

Updating Client Assessment Information in HMIS

To update your client’s assessment data in HMIS, you will create an **Interim Review**. Interim Reviews can be found under the Entry/Exit tab.

- To initiate an Interim Review, click on the icon  in the Interims column in the same row as the Entry that will be updated.

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements
<p> Reminder: Household members must be established on Households tab before creating Entry / Exits.</p>							
Entry / Exit							
Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count	
All Chicago - Emergency Shelter (883)	HUD	 06/10/2016					
All Chicago - PATH (1418)	PATH	 06/08/2016					
<input type="button" value="Add Entry / Exit"/>				Showing 1-2 of 2			

- Next, you will click on the button to Add Interim Review

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type
<input type="button" value="Add Interim Review"/> No matches.	

- In the next screen, you will determine the Interim Review Type and Review Date.

Interim Review Type * -Select-

Review Date * 07 / 19 / 2016   5 : 09 : 58 PM

- The Update and Annual Assessment types are used most often to update client’s assessment data.

-Select-

-Select-

Update

Annual Assessment

- After clicking **Save & Continue**, you will see the assessments available to your program and can make your updates, as needed.
- Before making your changes to the assessment, ensure that the Interim Review type and Assessment match.

Entry / Exit Interim Review

Interim Review Data	
Entry / Exit Provider	All Chicago - Emergency Shelter (883)
Entry / Exit Type	HUD
Interim Review Type	Update
Review Date	05/27/2016 10:35:28 AM

If you are creating an Update, make sure you are on the Update Assessment.

If the Annual Assessment populates when you are creating an Update, simply click on the correct assessment.

Interim Review Assessment			
Select an Assessment			
<input checked="" type="checkbox"/> Chicago Ending Veteran Homelessness - Matching/Referral Assessment	<input checked="" type="checkbox"/> HUD CoC and ESG Entry (2015)	<input checked="" type="checkbox"/> HUD CoC and ESG Entry (Copy)	<input checked="" type="checkbox"/> HHS PATH Entry (2015)
<input checked="" type="checkbox"/> VA SSVF (2015)	<input checked="" type="checkbox"/> HUD CoC and ESG Exit (2015)	<input checked="" type="checkbox"/> HUD CoC and ESG Update (2015)	<input checked="" type="checkbox"/> Annual Assessment (2015)

Household Members HUD CoC and ESG Update (2015) Interim Review Date: 05/27/2016 10:35:28 AM

Updating Sub-Assessment data

Monthly Income, Non-Cash Benefits, Health Insurance and Disabilities are all considered sub-assessments.

- Never write over your history in sub-assessments. If you need to reflect a change in income, you must put an End Date on the income record that has changed and add a new record to show the updated information. Also update the Total Monthly Income field, if income has changed.
- Adding an End Date to a sub-assessment record indicates that it has ended, as of that date.
- Make sure that the Start and End Dates for the sub-assessment records you update are not over-lapping. This means you do not want to have one record end and another record start on the same date.
- If a client had no income at Entry, but later started earning income, it is necessary to update the record for the income source that was created at Entry. For example, if the client started receiving Earned Income after Entry, the original Earned Income Sub-Assessment record requires an End Date. Specifically the record indicating that the client had no income. This same logic applies to all Sub-Assessment updates, where you are reflecting that something has started that the client previously stated they did not have.

Locating the sub-assessment record that needs updating

The screenshot shows a table titled "Monthly Income" with a "HUD Verification" status of "checked". A red dashed arrow points from a magnifying glass icon to the "Monthly Amount" column. A callout box contains the following text:

To locate the sub-assessment record that needs to be updated, use the navigation buttons or the magnifying glass.

Remember to add End Dates and ADD a new record when income changes.

Below the table, there are navigation buttons: "Add", "View Gross Income", "Showing 1-5 of 15", "First", "Previous", "Next", and "Last".

Monthly Amount	Source of Income	Receiving Income Source
	Other (HUD)	No
	Alimony or Other Spousal Support (HUD)	No
	Child Support (HUD)	No
	Pension or retirement income from another job (HUD)	No
	VA Non-Service Connected Disability Pension (HUD)	No

Example of an updated Income Sub-Assessment record

The screenshot shows an updated "Monthly Income" table with the following columns: Provider, Monthly Amount, Source of Income, Receiving Income Source?, Start Date, and End Date.

Provider	Monthly Amount	Source of Income	Receiving Income Source?	Start Date	End Date
All Chicago (1)	US\$100.00	Earned Income (HUD)	Yes	01/24/2016	07/01/2016
All Chicago (1)	US\$350.00	Earned Income (HUD)	Yes	07/15/2016	

Below the table, there is a "Total Monthly Income" field with a value of 350 and a currency symbol (G).

Update vs. Annual Assessment

Update: can be created at any time, after the client has been entered into the program. The Update Assessment contains data elements that are collected at multiple points during project enrollment. Updates allow you to track changes over time with client housing status, income, benefits, etc.

RRH Note: The Update Assessment is where you will indicate when the client has moved into permanent housing.

Annual Assessment: must be completed for clients that remain enrolled in a project for one year or longer. The annual assessment must be recorded no more than 30 days before or after the anniversary of the client's Project Entry Date, regardless of the date of the most recent update.

Helpdesk support is always available to answer questions about updating client assessment information. Email HMIS@allchicago.org to contact the Helpdesk.