

Sub-Assessment Addendum SP5.12

Sub-Assessments allow for recording and reporting on multiple sources and amounts for each type of benefit. It also allows for measuring changes over a period of time, as long as the data entry is timely and accurate. There are many kinds of Sub-Assessments. Below are the Sub-Assessments required by HUD. This document provides detailed guidance on creating and managing those Sub-Assessments.



Sub-Assessment	Collected For	Collection Point
Disability	All Clients	Program Entry
Income	All Adults and HoH*	Program Entry, Interim Review, Annual Assessment, Program Exit
Non-Cash Benefits	All Adults and HoH*	Program Entry, Interim Review, Annual Assessment, Program Exit
Health Insurance	All Clients	Program Entry, Interim Review, Annual Assessment, Program Exit

* Accompanied children's Income and Non-Cash benefits for households under the age of 18 years are recorded on the **Head of Household's** assessment, also known as the Primary Client. On child(ren)'s assessment, select "Data not collected".

A Child =
Under the age
of 18 years.


* Once the accompanied child turns 18 the income and/or non-cash benefits record is ended in the Head of Household's sub-assessment and moved to the child's sub-assessment with a start date of their 18th birthday.

HUD Verification


HUD Verification is required when  appears on a sub-assessment. Select  and complete a response for each source or type.

Income


Income from Any Source Yes (HUD) No G

Monthly Income HUD Verification 

Source of Income *	Income from any source	Receiving Income Source?	Start Date *	End Date
No matches.				

 Any response that appears as **Incomplete** must be moved to another response to complete the verification.

HUD Verification: Monthly Income for 09/18/2014

 Per Source of Income, the current records for Monthly Income as of 09/18/2014 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 09/18/2014, 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 type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Worker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Adding and Updating Sub-Assessments

When a source or type is marked as being received, an additional assessment will appear.



1. If receiving, record the monthly gross Income.
2. Enter the date that this Source/Type (and Amount, if receiving) began in the **Start Date** field.
3. Complete any additional fields if applicable.

Note: If adding notes on Disability, add only minimum information and no private information.

4. Select **Save**.

The screenshot shows the 'Monthly Income' form with the following fields: Monthly Amount (text input), Source of Income* (dropdown menu), If Other, Please Specify (text area), Receiving Income Source? (dropdown menu), Start Date* (date input), End Date (date input), and Notes about income (text area). A tooltip box highlights the Start Date and End Date fields with the text: 'Start Date = Date this Occurrence (Source and/or amount) began.' and 'End Date = Date this Occurrence (Source and/or amount) ended.' The form also includes Save, Save and Add Another, and Cancel buttons.

When a source is either no longer received or the amount has changed -

1. In the sub-assessment, edit  the source or type that is being updated.
2. Enter the date that this Source/Type (and Amount, if receiving) was last received in the **End Date** field.
3. Select **Save**.
4. If  appears, complete the **HUD Verification**.
5. Update the leading question if appropriate.

The screenshot shows the 'Monthly Income' form with the following fields: Monthly Amount (text input with value 1800), Source of Income* (dropdown menu with value Earned Income (HUD)), If Other, Please Specify (text area), Receiving Income Source? (dropdown menu with value Yes), Start Date* (date input with value 03 / 06 / 2018), End Date (date input with empty fields), and Notes about income (text area). A red arrow points to the End Date field. The form also includes Print Recordset, Save, Save and Add Another, and Cancel buttons.

No End Date = currently being received

- ! Use **Interim Reviews** to record updates and additions to Income, Non-Cash Benefit, and Health Insurance during program participation.
- ! Updates to the Disability question is to be recorded at **Entry**, no matter the instance of occurrence.
- ! HUD requires an **Annual Review** Type for each client that is in a program for a year or more, and must be completed within 1 month before the anniversary of the client's program entry date.