

HMIS Data Entry and Reporting Instructions: Income/Benefits Excerpt

Recording Cash Income at Entry

The cash income question and sub-assessment apply to all programs *except* ESP, ESGP, and DHS-Youth.

HUD and HPRP programs: Complete for all clients, including children.

LTH, THP, and FHPAP programs: Complete for all adults 18+ and unaccompanied youth.

Note: if a program receives both HUD and state funding, please follow the HUD requirements.

Instructions

- Answer “Income received from any source in the past 30 days?”
 - If the answer is “yes,” continue to the sub-assessment. If “no,” continue to the Non-Cash Benefits section.
- Click **Add** in the right-hand corner of the Cash Income box. A pop-up window will open.
- **Start date:** enter as the **program entry date**, even if the client received the income source before he/she started the program.
 - If you are in backdate mode correctly, the start date should automatically be filled in as the program entry date.
- **Last 30 day income:** Enter the appropriate amount
- **Source of income:** select from the dropdown menu.
 - For **LTH, THP, and FHPAP programs:**
 - Enter all general household income, as well as any income paid on behalf of children (such as TANF), in the head of household’s record.
 - Enter earned income on the record of the adult that earns the income.
 - For **HUD and HPRP programs**, income is required for all clients (including children):
 - Assign an income source to a household member if the source/amount leaves the household when that member departs.
 - Do not assign the same income source/amount to more than one person in the same household.
 - Record SSI payments received on behalf of a child on the child’s own record.
 - TANF, child support, and alimony can be recorded on the adult recipient’s record.
 - If you select “other,” as a source of income, please specify the source.
- **Receiving income source:** This question defaults to “yes.” You do not need to change it, even if it ends. A “no” answer will cause reporting problems.
- **End date:** leave blank. The end date is used to show that an income source has ended.
- If the client has more than one income source, click **Save & Add Another**.
- Once you have finished entering all income sources, click **Save & Exit**.
- Be sure to wait for the screen to refresh before continuing to the next section!

Recording Non-Cash Benefits at Entry

The non-cash benefits question and sub-assessment apply to all programs *except* ESP, ESGP, and DHS-Youth.

HUD and HPRP programs: Complete for all clients, including children.

LTH, THP, and FHPAP programs: Complete for all adults 18+ and unaccompanied youth.

Note: if a program receives both HUD and state funding, please follow the HUD requirements.

Non-Cash Benefits at Entry

- Answer “Benefit received from any source in the past 30 days?”
 - If the answer is “yes,” continue to the sub-assessment. If “no,” continue to next part of the assessment.
- Click **Add** to the right of the Non-Cash Benefits box. A pop-up window will open.
- *Start date:* enter as the **program entry date**, even if the client received the income source before he/she started the program.
- *Amount of non-cash benefit:* You are not required to enter an amount. If you do, it will not be included in the household’s monthly income calculation.
- *Source of benefit:* select from the dropdown menu.
 - For **LTH, THP, and FHPAP programs:**
 - Record all benefits received by any member of the household in the head of household’s record.
 - Enter general household non-cash benefits and non-cash benefits paid on behalf of children (such as food stamps) on the head of household’s record.
 - For **HUD and HPRP programs:**
 - Assign non-cash benefits to **all** household members for whom the benefit is intended. **This works opposite from cash income!** In other words, if the family receives food stamps, **all** household members should have this benefit recorded!
 - If you select “other,” as a benefit, please specify the source.
- *Receiving benefit:* This question defaults to “yes.” You do not need to change it, even if it ends. A “no” answer will cause reporting problems.
- *End date:* leave blank. The end date indicates that the benefit has ended.
- If the client has more than one income source, click **Save & Add Another**.
- Once you have finished entering all income sources, click **Save & Exit**.
- Be sure to wait for the screen to refresh before continuing to the next section!
 - Make sure you can see the newly-recorded income in the box.

Update Income and Non-Cash Benefits

If the client's cash income and non-cash benefits haven't changed, updates are not necessary. If income has changed and updates are needed:

- 1) Log in to Service Point, click on "ClientPoint," and go into your client's record.
- 2) Click on the "Assessments" tab.
- 3) Select the Universal Assessment **or** your funder-specific assessment from the drop-down list on the left.
- 4) If the "Income Received from Any Source in the Past 30 Days" or "Benefit Received" questions have changed, go into backdate mode to the **last day of the reporting period you are updating for**. If you are making the update before the end of the reporting period, backdating is not necessary.
- 5) Scroll down to complete Cash Income and Non-Cash Benefits sections:
 - If the answers to "Income received from any source in the past 30 days?" or "Benefit received from any source in the past 30 days?" have changed, update the answer from the dropdown list. Make sure you are in backdate mode, if needed! (See step 4 above).
 - If an income or benefit has ended, complete the following steps:
 - Click on the pencil next to the income or benefit that has ended.
 - Enter an end date. End date can be the day the income source ended *or* a date before the end of the reporting period.
 - Leave "receiving income source" as "yes" (otherwise, that income record will not appear on reports). Then click [Save and Close](#).
 - If the amount of a client's cash income from a given source has changed, complete the following steps:
 - Click on the pencil next to the income amount that has changed.
 - Enter an end date (the last day the client received that income amount). Leave "receiving income source" as "yes" (otherwise, that income record will not appear on reports).
 - Create a new entry by clicking the [Add](#) button. Select the same source as before, but enter the new amount received. The start date should be the day **after** the previous income source ended. Then click [Save and Close](#).
 - If a client has new sources of income, or new non-cash benefits complete the following steps:
 - Create a new entry by clicking the [Add](#) button.
 - Complete the information in the box. Start date should equal the day the income started *or* a date before the end of the reporting period.
 - Click [Save and Close](#).
- 6) Update income for **all** household members whose income or benefits have changed. Remember that for HUD and HPRP programs, income and noncash benefits must be recorded (or ended) on all household members' records. Click on client names in the "Households Overview" box to switch between records.

Updates at Program Exit

The same steps listed above apply, but can be completed along with other exit information in the orange entry/exit box instead of the assessments section.