Advanced Training:

INCOME AND SOURCES

KnoxHMIS | KnoxHMIS.org
University of Tennessee College of Social Work Office of Research and Public Service
Presented February 27, 2020. Revised April 2020.

Outline

INCOME

1. Outcomes
2. Collection Criteria
3. Best Practices
4. Common Data Quality Errors
5. DQ Checkpoints: Using Reports
6. FAQ
7. User Resources & Support

OUTCOMES

Why is client income important?

How does it affect my work?

Q: Why is income data important?

A:

Income helps determine potential benefits, supportive services, and housing options for persons experiencing homelessness.

HUD Rationale: To determine whether households are accessing all income sources for which they are eligible at the time of project start and to show changes in the kinds of income between project start and exit.

Q: How does income data affect my work?

A:

Locally, collecting this information throughout a client's project stay supports case planning; you need income data to **link clients with every income source and benefit for which they're eligible.**

Nationally, this information helps CoCs improve system design and partnerships; connections across and between systems are analyzed to optimize access to funding sources.

Q: How else does income data affect my work?

A:

Increase in client income is a key performance measure of most Federal Partner programs. **Our CoC is scored annually on:**

1. The quality of our data on client income.
2. The total number of adults we serve who maintain and gain income during the year.
3. The percentage of our served adult population who maintain and gain income during the year.

Income Data and Federal Reports: Example #1

HUD CoC NOFA (Notice of Funding Availability)

We are scored on **Client Job and Income Growth** in HUD's CoC Program Competition ("the NOFA").

1. High Priority CoC Application Questions

CoC Application Questions	Maximum Score Available	CoC Score Received
3) provide the name of the organization or responsible for overseeing the CoC's strategy to viduals and persons in families returns to homelessness.		
3A-5. Job and Income Growth. Applicants must: (1) describe the CoC's strategy to increase access to employment and non-employment cash sources; (2) describe how the CoC works with mainstream employment organizations to help individuals and families increase their cash income; and (3) provide the organization name or position title that is responsible for overseeing the CoC's strategy to increase job and income growth from employment.	4	3.5

Source: HUD 2018 CoC Program Competition Debriefing, https://www.hudexchange.info/trainings/courses/fy-2018-continuum-of-care-competition-debriefing/2806/

Income Data and Federal Reports: Example #2

HUD SPM (System Performance Measures)

SPM = "the **established selection criteria** for awarding CoC Program projects and evaluating system performance"

Metric 4.2 – Change in non-employment cash income for adult system stayers during the reporting period

	Submitted FY 2018	FY 2019	Difference
Number of adults with increased non-employment cash income	58	61	3

	Submitted FY 2018	FY 2019	Difference
Universe: Number of adults (system stayers)	126	122	-4
Number of adults with increased total income	72	66	-6
Percentage of adults who increased total income	57%	54%	-3%

Metric 4.4 – Change in earned income for adult system leavers

	Submitted FY 2018	FY 2019	Difference
Universe: Number of adults who exited (system leavers)	427	430	3
Number of adults who exited with increased earned income	72	48	-24
Percentage of adults who increased earned income	17%	11%	-6%

Metric 4.5 – Change in non-employment cash income for adult system leavers

	Submitted FY 2018	FY 2019	Difference
Universe: Number of adults who exited (system leavers)	427	430	3
Number of adults who exited with increased non-employment cash income	26	33	7
Percentage of adults who increased non-employment cash income	6%	8%	2%

Metric 4.6 – Change in total income for adult system leavers

	Submitted FY 2018	FY 2019	Difference

Desired Outcome: Increase in the percent of adults who gain or increase employment or non-employment cash income over time

Measure 4: Employment and Income Growth for Homeless Persons in CoC Program-funded Projects

Desired Outcome	Increase in the percent of adults who gain or increase employment or non-employment cash income over time					
Metrics	**Metric 4.1:** Change in employment income during the reporting period for system stayers	**Metric 4.2:** Change in non-employment cash income during the reporting period for system stayers	**Metric 4.3:** Change in total cash income during the reporting period for system stayers	**Metric 4.4:** Change in employment income from entry to exit for system leavers	**Metric 4.5:** Change in non-employment cash income from entry to exit for system leavers	**Metric 4.6:** Change in total cash income from entry to exit for system leavers

COLLECTION CRITERIA

Which Clients am I required to ask about income?

How often do I need to collect income data?

Q: What is Data Element 4.02, *Income and Sources*?

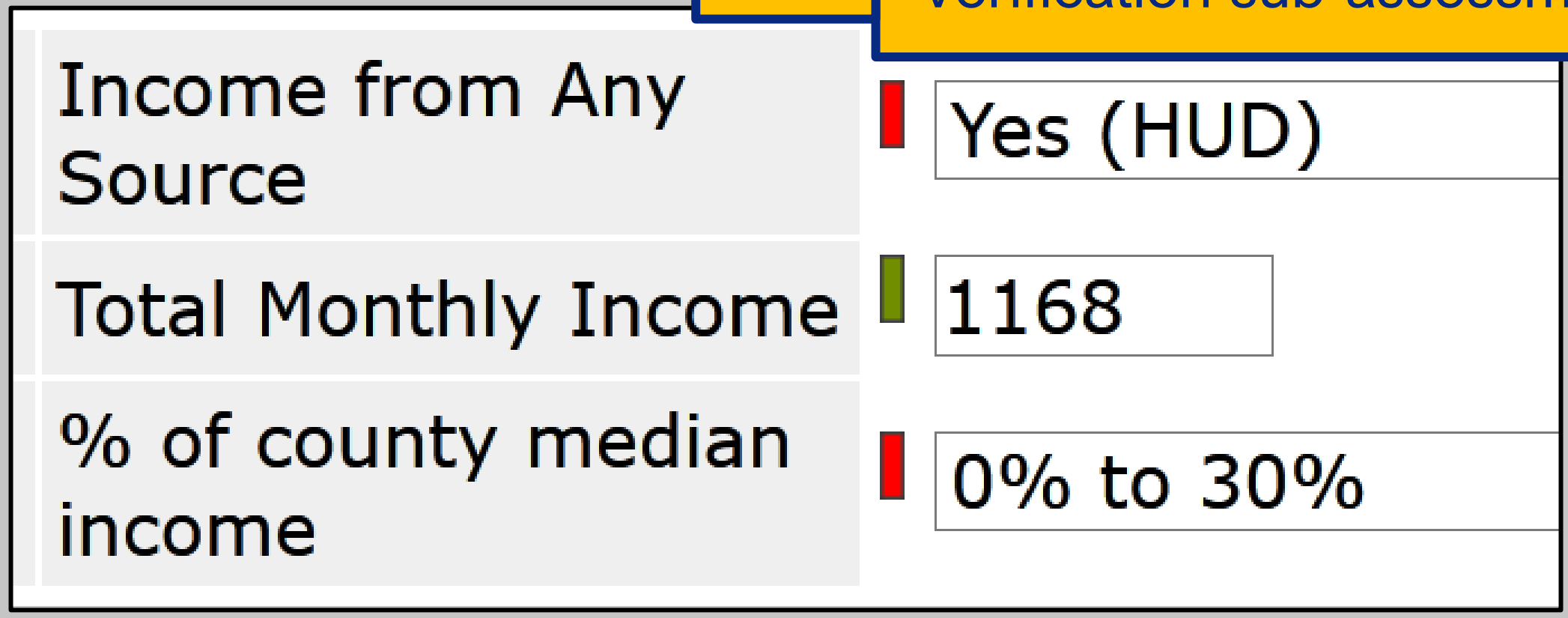
A: A common, Program Specific Data Element documenting whether Clients have income… and if they do, the **sources of** that income.

- Income from Any Source?
- Total Monthly Income
- % of county median income
- Sources of Income (HUD Verification sub-assessment)

Q: Where in KnoxHMIS are these data recorded?

A: Two places.

1 The three, overview questions under ***Income and Benefits***, just preceding the HUD Verification sub-assessment…



Q: Where in KnoxHMIS are these data recorded?

Source of Monthly Income — **HUD Verification**

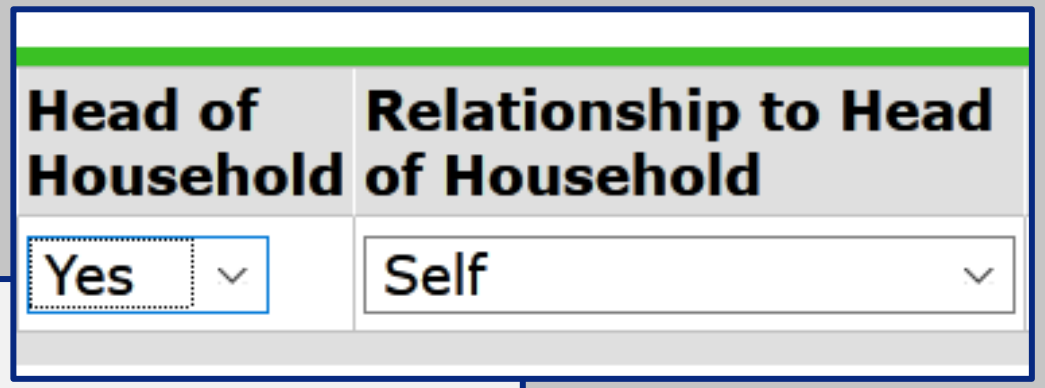
Source of Monthly Income	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	○	◉	○	○
Child Support (HUD)	○	◉	○	○
Earned Income (HUD)	○	◉	○	○
General Assistance (HUD)	○	◉	○	○
Other (HUD)	○	◉	○	○
Pension or retirement income from another job (HUD)	○	◉	○	○
Private Disability Insurance (HUD)	○	◉	○	○
Retirement Income From Social Security (HUD)	○	◉	○	○
SSDI (HUD)	◉	○	○	○
SSI (HUD)	○	◉	○	○
TANF (HUD)	○	◉	○	○
Unemployment Insurance (HUD)	○	◉	○	○
VA Non-Service Connected Disability Pension (HUD)	○	◉	○	○
VA Service Connected Disability Compensation (HUD)	○	◉	○	○
Worker's Compensation (HUD)	○	◉	○	○

…and the ***Source of Monthly Income*** HUD Verification sub-assessment.

Q: Who do I need to collect and record these data for?

A:

1. **Heads of Households***, and
2. **Every adult member** of a household.



* Including individuals recorded as heads of their own household— i.e., clients with “self” as their *Relationship to Head of Household*, and “other” as their *Household Type*.

Q: When do I collect Client Income and Sources?

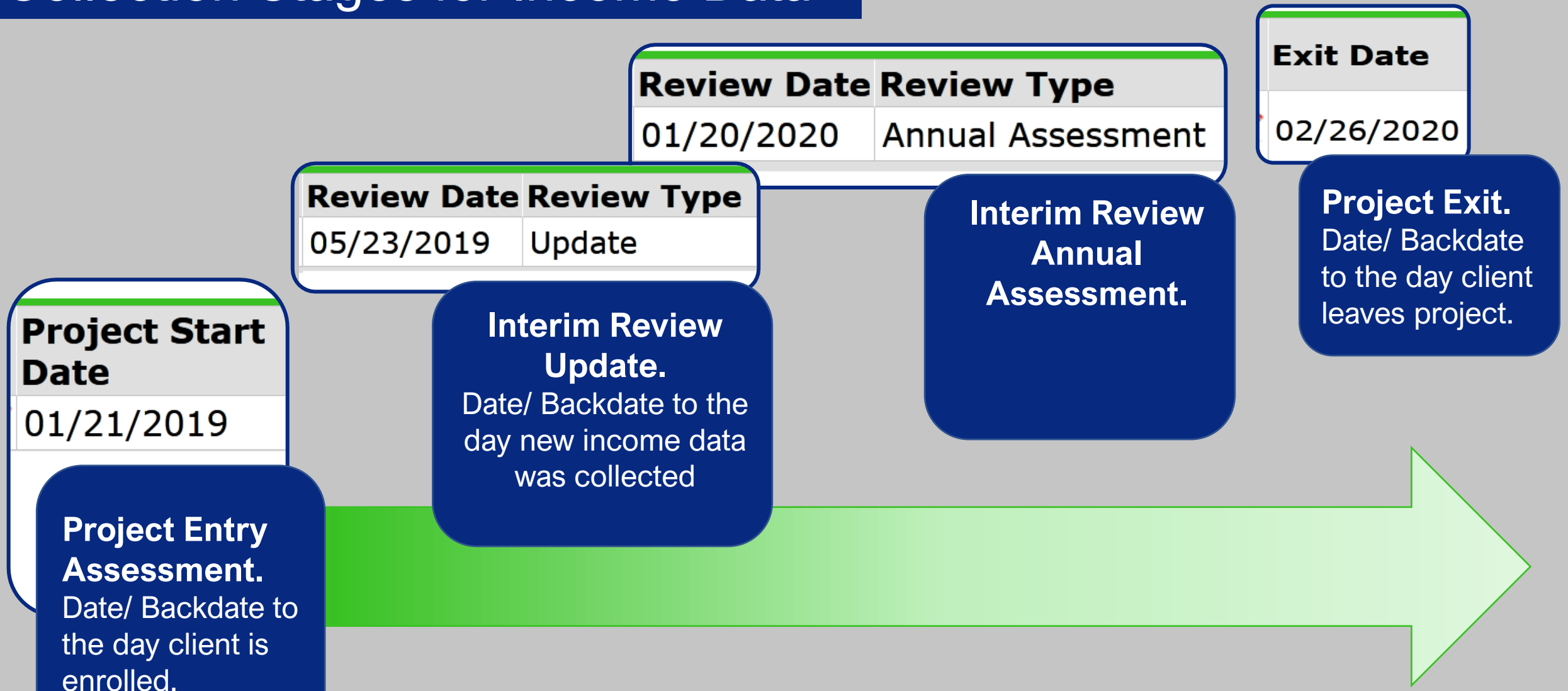
A: Income data has **multiple collection stages.**

1. **In the Project Entry Assessment.**
2. **In Interim Review Updates.**

   Any ***changes*** in your Clients' monthly income during a project stay (e.g. occurring between Project Start and Project Exit) must be recorded.
3. **In Interim Review Annual Assessments.**

   "An Annual Assessment is required for all persons residing in the project one year or more. Income and sources must be recorded in the HMIS as an Annual Assessment ***even if there is no change in either the income or sources***" (HUD).
4. **At Project Exit.**

Collection Stages for Income Data



BEST PRACTICES

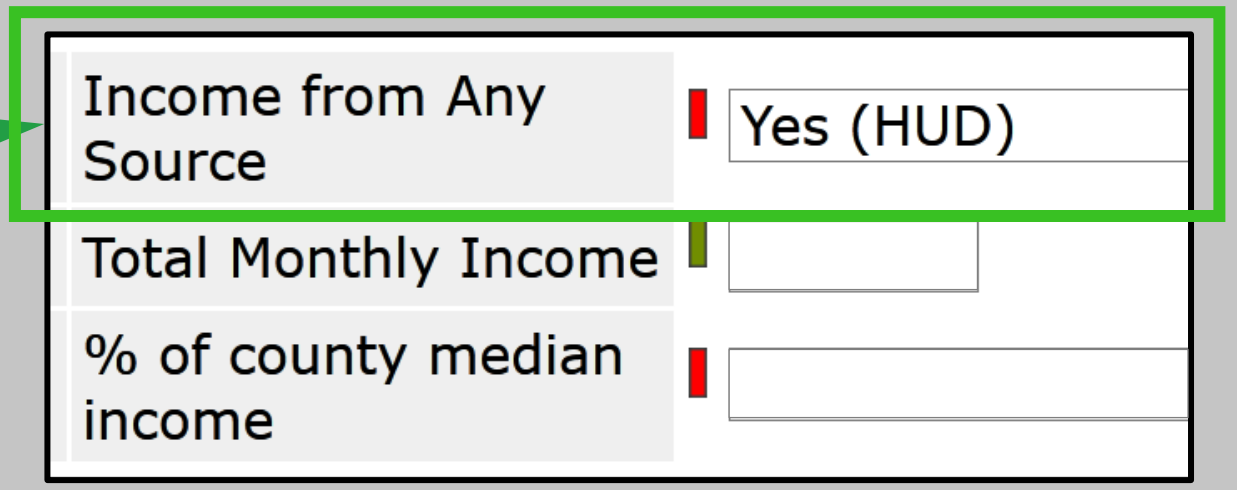
Tips for Data Entry at all Collection Stages

PROJECT ENTRY

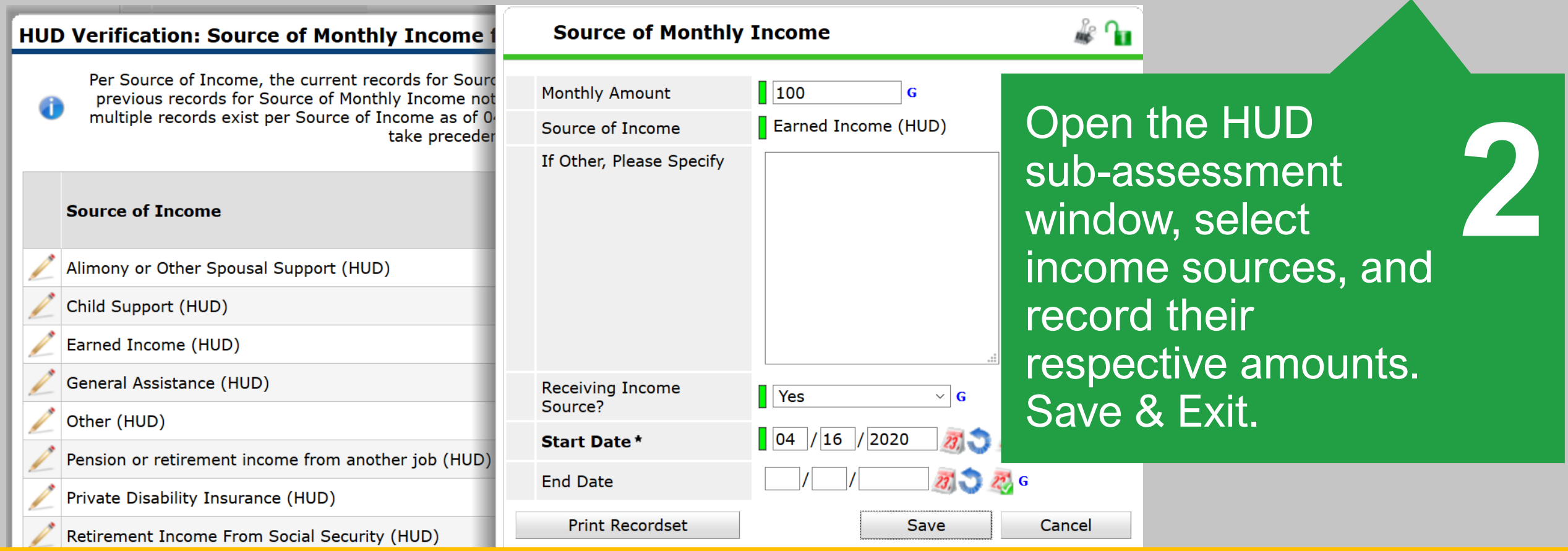
Workflow: Income Data at Project Entry

1. Answer the Y/N overview question preceding the HUD verification sub-assessment first.
2. Open the HUD verification sub-assessment window to select sources and input amounts.
3. Click "View Gross Income" to find the Monthly Income listed there and enter this amount in the Total Monthly Income field.
4. Clean up all inaccurate data from prior entries.
5. Schedule periodic reviews of income with the client to collect data and keep KnoxHMIS current and reliable.

1 Answer the Y/N overview question **preceding** the HUD sub-assessment.



- This Yes/No question must have an answer selected.
- The Yes/No responses you enter in the income sub-assessment do not populate the overview questions.
- The data entered in the overview questions need to be consistent with your responses in the sub-assessment.

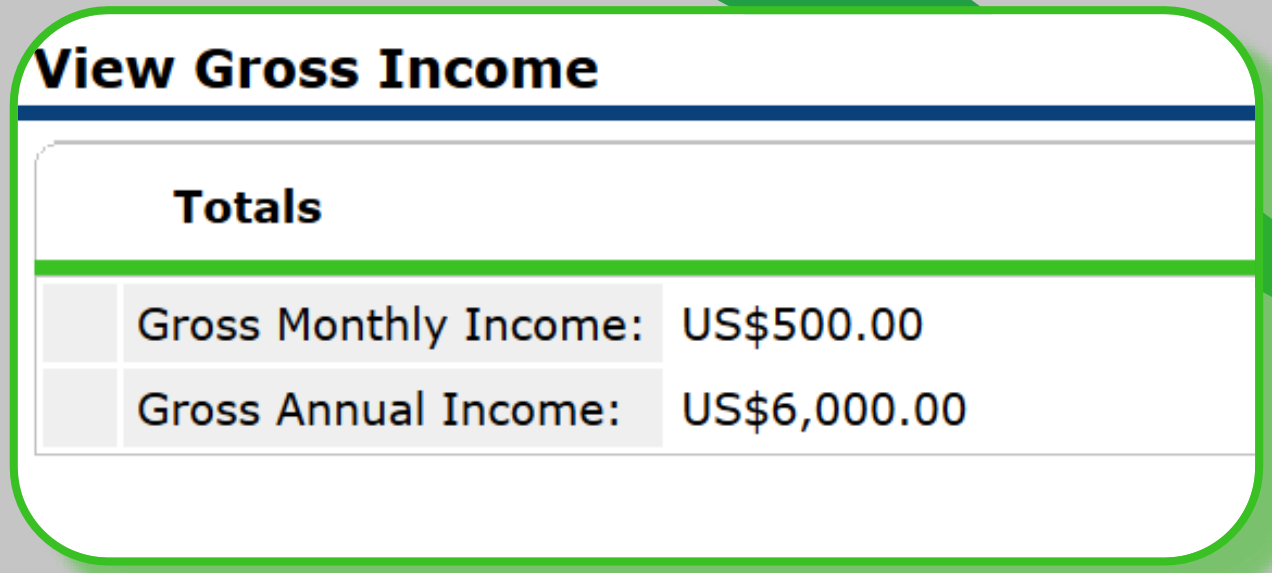


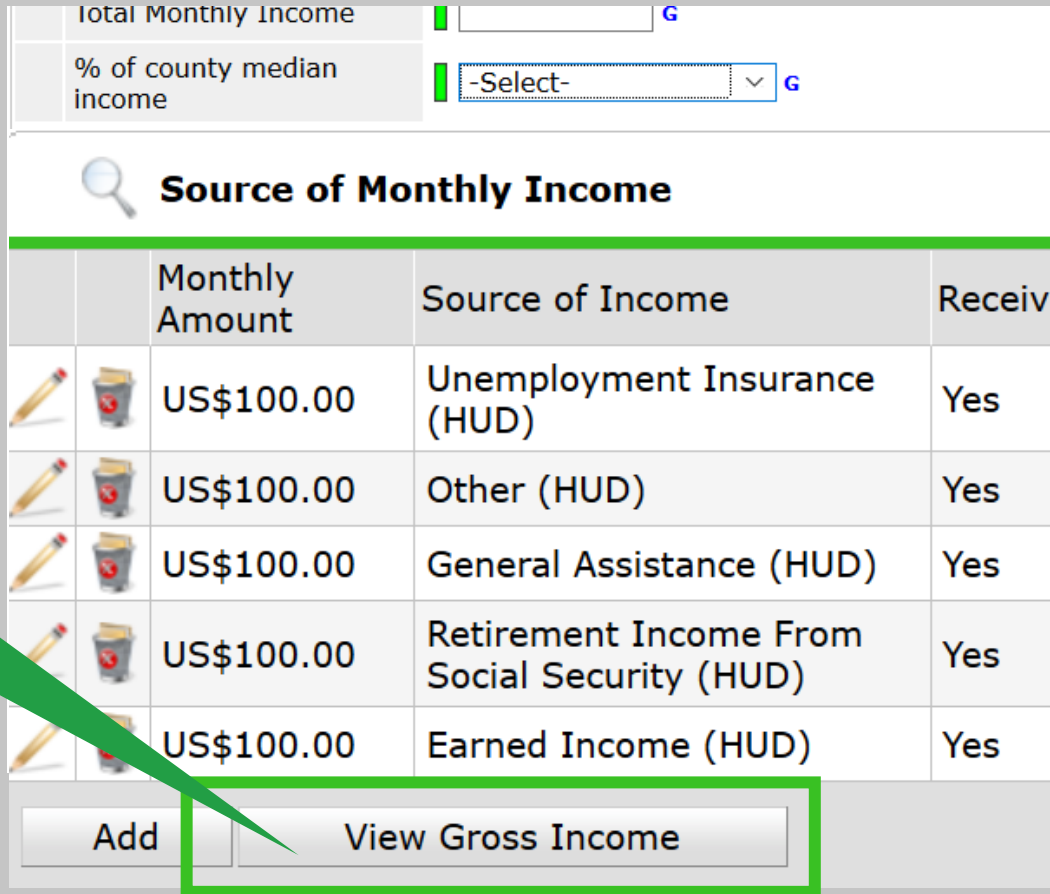
Open the HUD sub-assessment window, select income sources, and record their respective amounts. Save & Exit.

2

Start Date on an Income Source = Project Start Date.
Even if the Client has been receiving it prior to project enrollment, our records must reflect that this information wasn't known until **the date you collected it.**

3 Click the "View Gross Income" button to find the gross monthly listed there…





INCOME AND BENEFITS INFORMATION {Heads of Households AND Adults}

Income from Any Source	Yes (HUD)
Total Monthly Income	500
% of county median income	-Select-

…and enter this amount in the Total Monthly Income overview question.

4 Clean up all inaccurate data from prior entries.

Income data from other projects will pull into your Entry Assessment and may no longer be current or correct. These create conflicts and lower data quality scores. For Example:

- Picklist options without “HUD” after them, such as “no financial resources,” and blank entries. **Trash these.**
- Income sources the Client is no longer receiving. **Add an end date prior to your Project Start Date.**

These 15 picklist options are the only ones you should see in an entry:

1. Alimony or Other Spousal Support (HUD)
2. Child Support (HUD)
3. Earned Income (HUD)
4. General Assistance (HUD)
5. Other (HUD)
6. Pension or retirement income from another job (HUD)
7. Private Disability Insurance (HUD)
8. Retirement Income From Social Security (HUD)
9. SSI (HUD)
10. SSDI (HUD)
11. TANF (HUD)
12. Unemployment Insurance (HUD)
13. VA Service Connected Disability Compensation (HUD)
14. VA Non-Service Connected Disability Pension (HUD)
15. Worker's Compensation (HUD)

Correct Example of Income Data Entry

INCOME AND BENEFITS INFORMATION {Heads of Households AND Adults}

Income from Any Source	Yes (HUD) G
Total Monthly Income	500. G
% of county median income	0% to 30% G

Source of Monthly Income — **HUD Verification**

		Monthly Amount	Source of Income		Date *	End Date
		US$100.00	Unemployment Ins (HUD)		/2020	
		US$100.00	Other (HUD)	Yes	04/16/2020	
		US$100.00	General Assistance (HUD)	Yes	04/16/2020	
		US$100.00	Retirement Income From Social Security (HUD)	Yes	04/16/2020	
		US$100.00	Earned Income (HUD)	Yes		

Income from Any Source has a Yes or No answer **consistent with HUD-V responses.**

Total Monthly Income reflects the sum of the amounts entered in HUD-V.

HUD-V shows green check.

Only HUD picklist options are used in the sub-assessment.

5 Schedule reviews with the client to identify any changes to their information.

System Performance Measure 4: Employment and Income Growth for Homeless Persons in CoC Program-funded Projects

Desired Outcome	Increase in the percent of adu employment or non-employme		
Metrics	**Metric 4.1:** Change in employment income during the reporting period for system stayers	**Metric 4.2:** Change in non-employment cash income during the reporting period for system stayers	**Metric 4.3:** Change in total cash income during the reporting period for system stayers

"Desired Outcome:
Increase in the percent of adults who gain or increase employment or non-employment cash income **over time**"

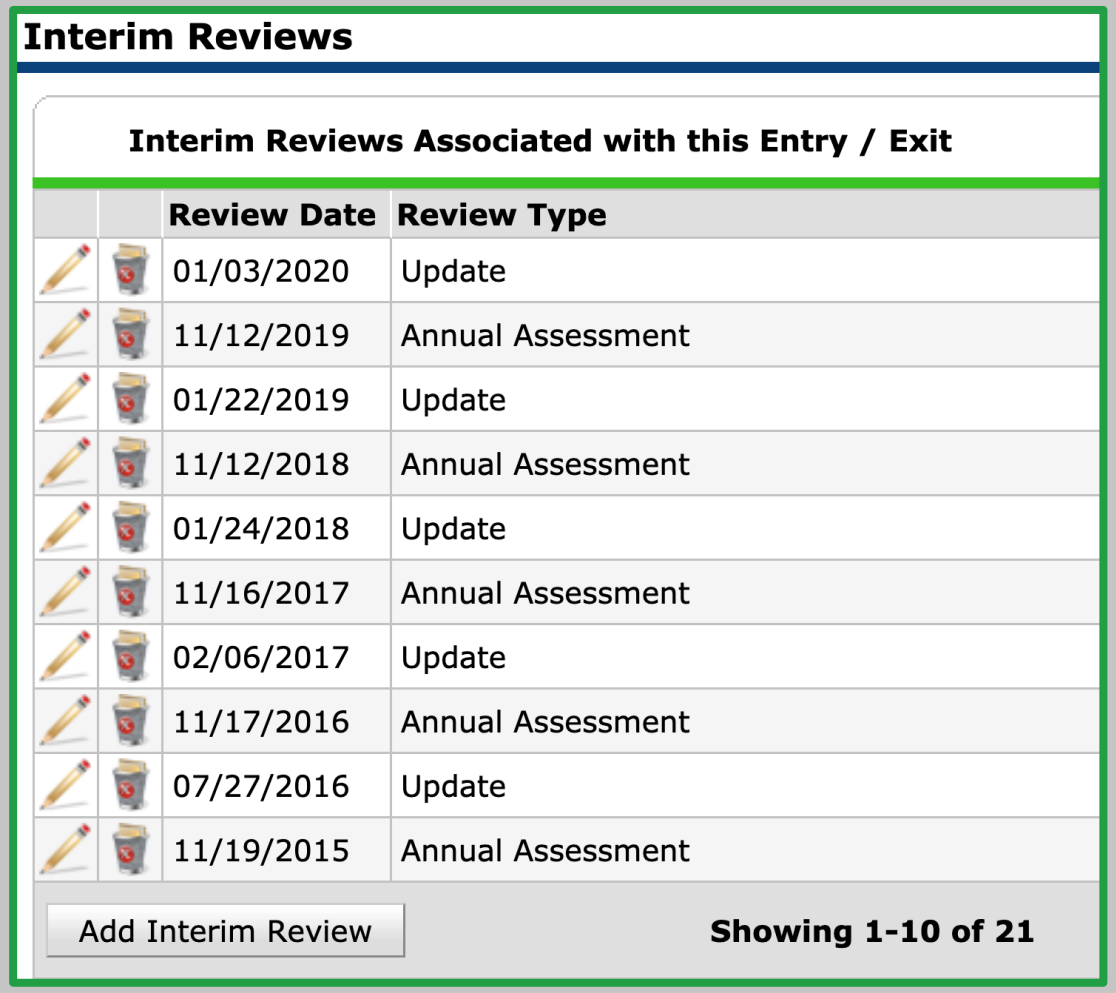
UPDATES & ANNUAL ASSESSMENTS

Periodic collection of information about Client Income is required.

Using Interim Reviews, these data are input as:

► **Updates** for changes during a project stay.

► **Annual Assessments** around the anniversary of enrollment, regardless of any changes to income.



UPDATES

All changes in Client income during a project stay (e.g., occurring between Project Start and Project Exit) must be collected and recorded.

- Record data as an Interim Review Update, and follow the same guidelines for recording Client income at Project Entry.

- Income data from other projects will pull into your Interim Review Assessment and may no longer be current or correct (just as with Entry Assessments).

ANNUAL ASSESSMENTS

An Annual Assessment is **required for all persons enrolled in a project one year or more**, **even if there are no changes** in either the income amount or sources.

- Collect and record data as an Interim Review *Annual Assessment* within 60 days of (before or after) the anniversary the Client was enrolled in the project.
- There can be only one "Annual Assessment" per year — all other income data are recorded as Updates.
- For income sources that are no longer valid, add the review date as the end date, but leave the "Yes" response in Receiving Income.

PROJECT EXIT

Workflow: Income Data at Project Exit

1. Answer the Y/N question preceding the HUD verification sub-assessment first.
2. Open the HUD verification sub-assessment window to select sources and input amounts.
3. Click "View Gross Income" to find the Monthly Income listed there and enter this amount in the Total Monthly Income field.
4. Clean up all inaccurate data pulling in from other entries.

CHECKLIST: Income Data at All Stages

- ❑ “Yes” is recorded for all income regardless of knowing exact amount, in which case the amount is estimated.
- ❑ The sum of all income amounts in the sub-assessment match the amount in “Total Income.”
- ❑ All previously-entered data is analyzed for accuracy, and end dates are added to income no longer received.
- ❑ The HUD verification has a green checkmark.
- ❑ A review is scheduled with the client to identify any changes and update their information (except at Project Exit).

Last but not least… a tip from a KnoxHMIS rockstar:

“Go ahead and Back Date Mode for the entry you're reviewing, in case there's something you want to clean up.

Just scroll through and see if there's anything that looks off.”

Common Data Quality Errors

Can you spot?

DQ Error, Example 1

INCOME AND BENEFITS INFORMATION {Heads of Households AND Adults}

Income from Any Source	Yes (HUD) G
Total Monthly Income	100 G
% of county median income	0% to 30% G

Source of Monthly Income HUD Verification

Monthly Amount	Source of Income	Receiving Income Source?	**Start Date** *	End Date
US$100.00	Contributions From Other People	Yes	04/18/2018	
	Worker's Compensation (HUD)	Data Not Collected	12/14/2015	
	VA Service Connected Disability Compensation (HUD)	Data Not Collected	12/14/2015	
	VA Non-Service Connected Disability Pension (HUD)	Data Not Collected	12/14/2015	
	Unemployment Insurance (HUD)	Data Not Collected	12/14/2015	

Add | View Gross Income | **Showing 16-20 of 31** | First | Previous | Next | Last

Non-HUD picklist option

INCOME AND BENEFITS INFORMATION {Heads of Households AND Adults}

Income from Any Source	Yes (HUD) G
Total Monthly Income	100 G
% of county median income	0% to 30% G

Source of Monthly Income HUD Verification

		Monthly Amount	Source of Income	Receiving Income Source?	Start Date *	End Date
		US$100.00	Contributions From Other People	Yes	04/18/2018	
			Worker's Compensation (HUD)	Data Not Collected	12/14/2015	
			VA Service Connected Disability Compensation (HUD)	Data Not Collected	12/14/2015	
			VA Non-Service Connected Disability Pension (HUD)	Data Not Collected	12/14/2015	
			Unemployment Insurance (HUD)	Data Not Collected	12/14/2015	

Add | View Gross Income | Showing 16-20 of 31 | First | Previous | Next | Last

Watch out for Non-HUD picklist options…

- ~~Alimony~~
- Alimony or Other Spousal Support (HUD)
- ~~Annuities~~
- Child Support (HUD)
- ~~Contributions From Other People~~
- ~~Dividends (Investments)~~
- Earned Income (HUD)
- General Assistance (HUD)
- ~~Interest (Bank)~~
- ~~No Financial Resources~~
- Other (HUD)
- Pension or retirement income from another job (HUD)
- ~~Pension/Retirement~~
- Private Disability Insurance (HUD)

~~Railroad Retirement~~

~~Rental Income~~

~~Retirement Disability~~

Retirement Income From Social Security (HUD)

~~Self Employment Wages~~

SSI (HUD)

SSDI (HUD)

~~State Disability~~

TANF (HUD)

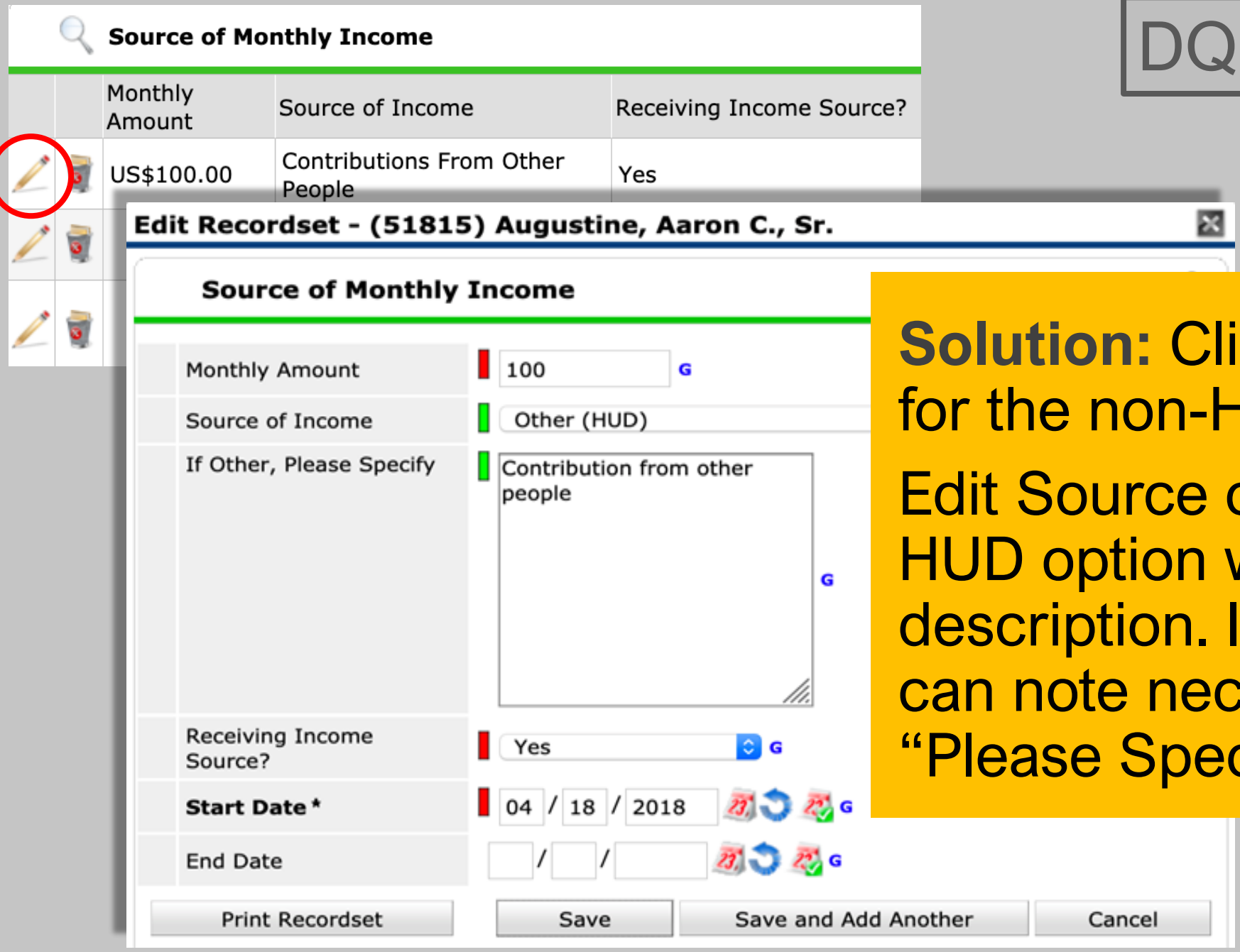
Unemployment Insurance (HUD)

VA Service Connected Disability Compensation (HUD)

VA Non-Service Connected Disability Pension (HUD)

Worker's Compensation (HUD)

DQ Error, Example 1



Solution: Click the edit pencil for the non-HUD picklist option.

Edit Source of Income to the HUD option with the closest description. If using "Other," you can note necessary details in the "Please Specify" text box.

Can you spot?

DQ Error, Example 2

Source of Monthly Income HUD Verification

		Monthly Amount	Source of Income	Receiving Income Source?	**Start Date** *	End Date
			General Assistance (HUD)	No	02/02/2018	
			Earned Income (HUD)	No	02/02/2018	
			Child Support (HUD)	No	02/02/2018	
			Alimony or Other Spousal Support (HUD)	No	02/02/2018	
				No	02/02/2018	02/01/2019

Add | View Gross Income | **Showing 11-15 of 15** | First | Previous | Next | Last

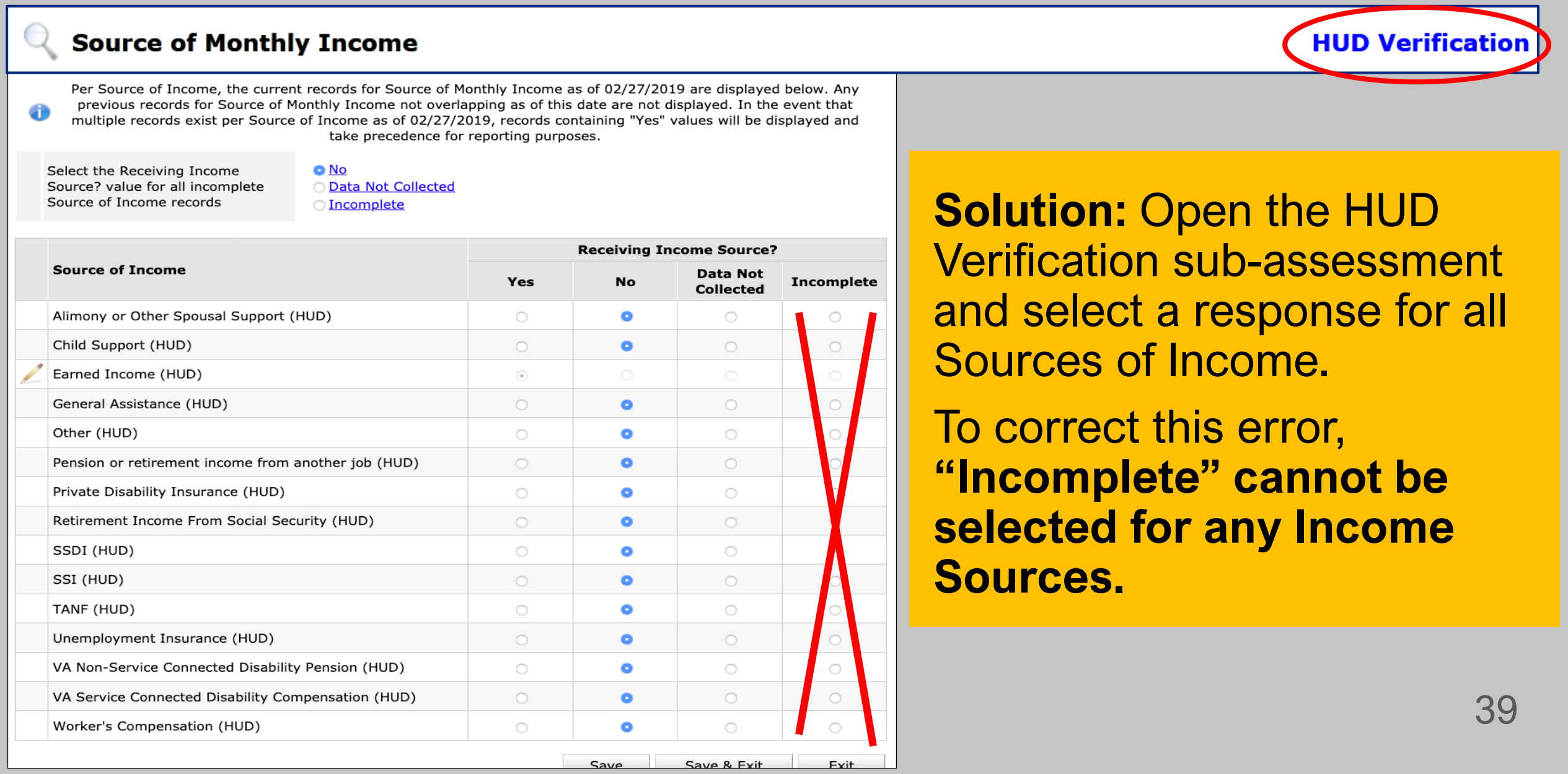
Incomplete HUD Verification AND a blank Source of Income

Source of Monthly Income — **HUD Verification**

		Monthly Amount	Source of Income	Receiving Income Source?	**Start Date** *	End Date
			General Assistance (HUD)	No	02/02/2018	
			Earned Income (HUD)	No	02/02/2018	
			Child Support (HUD)	No	02/02/2018	
			Alimony or Other Spousal Support (HUD)	No	02/02/2018	
				No	02/02/2018	02/01/2019

Add | View Gross Income | **Showing 11-15 of 15** | First | Previous | Next | Last

DQ Error, Example 2



Source of Monthly Income

HUD Verification

Per Source of Income, the current records for Source of Monthly Income as of 02/27/2019 are displayed below. Any previous records for Source of Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 02/27/2019, 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

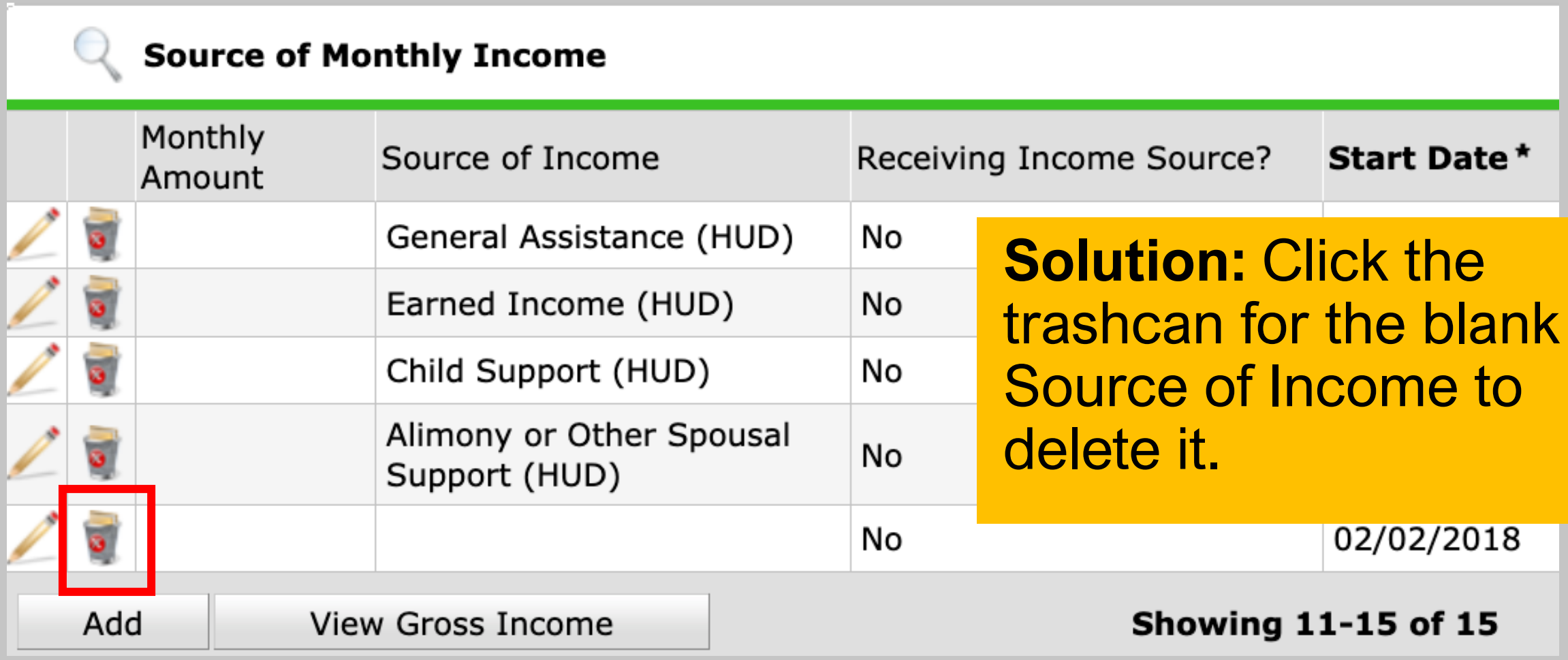
Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	( )	(•)	( )	( )
Child Support (HUD)	( )	(•)	( )	( )
Earned Income (HUD)	( )	( )	( )	( )
General Assistance (HUD)	( )	(•)	( )	( )
Other (HUD)	( )	(•)	( )	( )
Pension or retirement income from another job (HUD)	( )	(•)	( )	( )
Private Disability Insurance (HUD)	( )	(•)	( )	( )
Retirement Income From Social Security (HUD)	( )	(•)	( )	( )
SSDI (HUD)	( )	(•)	( )	( )
SSI (HUD)	( )	(•)	( )	( )
TANF (HUD)	( )	(•)	( )	( )
Unemployment Insurance (HUD)	( )	(•)	( )	( )
VA Non-Service Connected Disability Pension (HUD)	( )	(•)	( )	( )
VA Service Connected Disability Compensation (HUD)	( )	(•)	( )	( )
Worker's Compensation (HUD)	( )	(•)	( )	( )

Save | Save & Exit | Exit

Solution: Open the HUD Verification sub-assessment and select a response for all Sources of Income.

To correct this error, **"Incomplete" cannot be selected for any Income Sources.**

DQ Error, Example 2



Solution: Click the trashcan for the blank Source of Income to delete it.

Can you spot?

DQ Error, Example 3

INCOME AND BENEFITS INFORMATION {Heads of Households AND Adults}

Income from Any Source	-Select- G
Total Monthly Income	G
% of county median income	-Select- G

Source of Monthly Income HUD Verification

		Monthly Amount	Source of Income	Receiving Income Source?	**Start Date** *	End Date
			Worker's Compensation (HUD)	No	07/15/2019	
			VA Service Connected Disability Compensation (HUD)	No	07/15/2019	
			VA Non-Service Connected Disability Pension (HUD)	No	07/15/2019	
			Unemployment Insurance (HUD)	No	07/15/2019	
			TANF (HUD)	No	07/15/2019	

Add | View Gross Income | **Showing 1-5 of 15** | First | Previous | Next | Last

Income Overview Questions are unanswered

INCOME AND BENEFITS INFORMATION {Heads of Households AND Adults}

Income from Any Source	-Select- G
Total Monthly Income	G
% of county median income	-Select- G

Source of Monthly Income

		Monthly Amount	Source of Income	Receiving Income Source?	**Start Date** *
			Worker's Compensation (HUD)	No	07/15/2019
			VA Service Connected Disability Compensation (HUD)	No	07/15/2019

DQ Error Example 3: Solution for unanswered overview questions

INCOME AND BENEFITS INFORMATION {Heads of Households AND Adults}

Income from Any Source	-Select- G
Total Monthly Income	G
% of county median income	-Select- G

Source of Monthly Income

Monthly Amount	Source of Income	Receiving Income Source?	Start Dat
	Worker's Compensation (HUD)	No	07/15/20
	VA Service Connected Disability Compensation (HUD)	No	07/15/20
	VA Non-Service Connected Disability Pension (HUD)	No	07/15/2019
	Unemployment Insurance (HUD)	No	07/15/2019
	TANF (HUD)	No	07/15/2019

Add | View Gross Income | **Showing 1-5 of 15** | First | Previous | Next | Last

BACKDATE to the date of the entry and answer the three income overview questions.

Can you spot?

DQ Error, Example 4

Income from Any Source	No (HUD) G
Total Monthly Income	888.83 G
% of county median income	0% to 30% G

Source of Monthly Income — HUD Verification

		Monthly Amount	Source of Income	Receiving Income Source?	**Start Date** *	End Date
			Worker's Compensation (HUD)	No	08/06/2019	
			VA Service Connected Disability Compensation (HUD)	No	08/06/2019	
			VA Non-Service Connected Disability Pension (HUD)	No	08/06/2019	
			Unemployment Insurance (HUD)	No	08/06/2019	
			TANF (HUD)	No	08/06/2019	

Add | View Gross Income | **Showing 1-5 of 15** | First | Previous | Next | Last

Inconsistent responses.

DQ Error, Example 4

Income from Any Source	No (HUD) G	
Total Monthly Income	888.83 G	
% of county median income	0% to 30% G	

Total Monthly Income has an amount entered, but the Y/N Overview question has “No” selected.

Source of Monthly Income HUD Verification

		Monthly Amount	Source of Income	Rece
			Worker's Compensation (HUD)	No
			VA Service Connected Disability Compensation (HUD)	No
			VA Non-Service Connected Disability Pension (HUD)	No
			Unemployment Insurance (HUD)	No
			TANF (HUD)	No

Add | View Gross Income

Open the sub-assessment to review the data.

If Client isn’t receiving income: Clear out the Total Monthly Income field and leave the “No” response to the Y/N Overview question.

If Client is receiving income: Double-check sources and amounts, edit as needed, and save & exit the sub-assessment. Use View Gross Income to find the correct amount for Total Monthly Income. Change the response to “Yes” for the Y/N Overview question.

Can you spot?

DQ Error, Example 5

INCOME AND BENEFITS INFORMATION {Heads of Households AND Adults}

Income from Any Source	No (HUD) G
Total Monthly Income	0 G
% of county median income	0% to 30% G

Source of Monthly Income HUD Verification

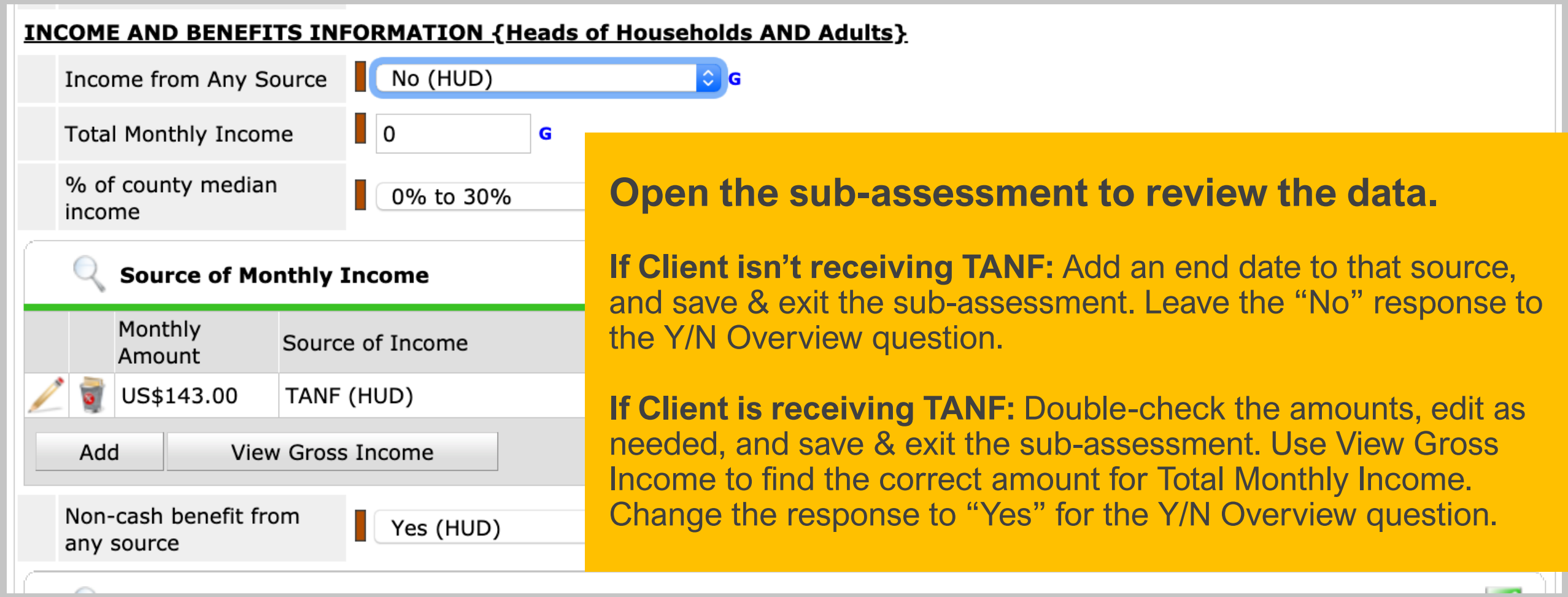
Monthly Amount	Source of Income	Receiving Income Source?	**Start Date** *	End Date
US$143.00	TANF (HUD)	Yes	07/13/2009	

Add | View Gross Income | **Showing 16-16 of 16** | First | Previous | Next | Last

Non-cash benefit from any source	Yes (HUD) G

Inconsistent responses.

DQ Error, Example 5



Open the sub-assessment to review the data.

If Client isn't receiving TANF: Add an end date to that source, and save & exit the sub-assessment. Leave the "No" response to the Y/N Overview question.

If Client is receiving TANF: Double-check the amounts, edit as needed, and save & exit the sub-assessment. Use View Gross Income to find the correct amount for Total Monthly Income. Change the response to "Yes" for the Y/N Overview question.

Data Quality Checkpoints

Data Quality Checkpoints:

- Review income with clients at each visit, or pre-schedule periodic reviews.
- Have a policy in place requiring residents to update income information when there are changes.
- Utilize KnoxHMIS reports to spot potential errors and identify Client records that need updating.

KnoxHMIS Data Quality (DQ) Reports

Report Name	Frequency	Date Range	Source
0252 - Data Completeness Report Card (EE) - v18 —OR— 0260 - HUD CoC APR Data Quality/Completeness - v9	Monthly	Your APR Year	KnoxHMIS sends to Agency Administrator
CoC APR 2019	Quarterly	Your APR Year	Self (run at Agency)
0640 - HUD Data Quality Report Framework - v9	Every 6 months	10/1—9/30	KnoxHMIS sends to Agency Administrator

ALWAYS **Back Date** when correcting income data— to the date **and** time of the collection stage in which the error occurred.

0252 - Data Completeness Report Card (EE)

Tab B

- Sent every month from KnoxHMIS.
- Grouped by type of data element (e.g., UDEs, Additional required, and HUD-Vs).
- Provides percentage of data completeness (Tab B) for an individual project, for their APR period.
- Detail page (Tab D) identifies which Client ID#s have omissions (null values) and specifies elements that are missing in table format.

GRADE BASED ON COUNT FOR EACH ELEMENT:	HUD UDE ONLY	Additional ONLY	HUD Verification ONLY	OVERALL
	A	A	A	A
	100.00%	100.00%	100.00%	100.00%

Data Element	Required for	Number of Applicable Entry Exits	Numbe r of Non-	Percentage Complete
*HUD Universal Data Elements:				
Name	All	72	72	100.00%
Social Security Number	All	72	72	100.00%
Date of Birth	All	72	72	100.00%
Race	All	72	72	100.00%
Ethnicity	All	72	72	100.00%
Gender	All	72	72	100.00%
Veteran Status	Adults	29	29	100.00%
Disabling Condition (Y/N)	All	72	72	100.00%
Residence Prior to Project Entry	Adults/HoH	29	29	100.00%
Length of Stay in Previous Place	Adults/HoH	29	29	100.00%
Destination (Exit)	Adults/HoH at Exit	18	18	100.00%

Entry Exit Information			HUD Universal Data Elements												Additional Data Elements					HUD Verification				
Client ID	Entry Date	Exit Date	Name	SSN	DOB	Race	Eth	Gen	Vet	YN Disab	Res Prior	LOS Prior	Dest Exit	HoH	Loc	DV	SVS	YN Inc	YN NC	YN Ins	Disab Ok=8	Inc Ok=15	Inc Amt	NC Ok=6	Ins Ok=10
12345	12/6/2018		Ok	Null	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	-	Ok	Ok	Ok	N/A	Ok	Ok	Ok	Ok	Ok	-	Ok	Ok
12346	12/6/2018	12/1/2019	Ok	Null	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	N/A	Ok	Ok	Ok	Ok	Ok	-	Null	Ok
12347	12/6/2018		Ok	Null	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	-	Ok	Ok	Ok	N/A	Ok	Ok	Ok	Ok	Ok	-	Ok	Ok
12348	12/6/2018		Ok	Null	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	-	Ok	Ok	Ok	N/A	Ok	Ok	Ok	Ok	Ok	-	Ok	Ok
12349	2/4/2019	10/1/2019	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	N/A	Ok	Ok	Ok	Ok	Ok	-	Ok	Ok
	12/14/2018	11/28/2019	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok	N/A	Ok	Ok	Ok	Ok	Ok	Ok	Ok	Ok

Tab D

0260 - HUD CoC APR Data Quality

Data Element	Required for	Number of Applicable Entry Exits	Number of Non-Null Values	Percentage Complete
HUD Universal Data Elements (All Clients):				
Name	All	72	72	100.00%
Social Security Number	All	72	72	100.00%
Date of Birth	All	72	72	100.00%
Race	All	72	72	100.00%
Ethnicity	All	72	72	100.00%
Gender	All	72	72	100.00%
Veteran Status	Adults	29	29	100.00%
Disabling Condition (Y/N)	All	72	72	100.00%
Residence Prior to P		29	29	100.00%
Length of Stay in Pre		29	29	100.00%
Destination (Exit)		18	18	100.00%

Client ID: 34526

Potential Data Quality Errors:

Annual Assessment

Disability Type

Income Source

Non-Cash Benefit

Health Insurance

Subassessment Detail

HUD Verification: (Elements measure completeness at entry ONLY)				
Disability Type	All	192	188	97.92%
Income Source	Adults/HoH	181	179	98.90%
Income Amount (for all valid sources)	Adults/HoH Recv Inc = Y	56	56	100.00%
Non-Cash Source	Adults/HoH	181	177	97.79%
Health Insurance Type	All	192	190	98.96%

- Sent every month from KnoxHMIS.
- Grouped by collection stage (Entry, Annual, Exit).
- Lists Client records missing data and potential DQ errors for a project's APR period.
- Includes detail pages for:
  - Assessment at Entry
  - HUD-V Sub-assessments at Entry, Exit, and Annual Review

HUD CoC APR 2019

- Self-run anytime (every quarter at minimum) with your APR period as the date range.
- Question 6c displays income errors by their collection stage (Entry, Annual, Exit).
- Error Count is hyperlinked to a list of Client records with the income errors.

6c– Data Quality: Income and Housing Data Quality

Data Element	Error Count	% of Error Rate
Destination (3.12)	0	0%
Income and Sources (4.2) at Start	2	4%
Income and Sources (4.2) at Annual Assessment	16	43%
Income and Sources (4.2) at Exit	0	0%

ALWAYS **Back Date** when correcting income data— to the date **and** time of the collection stage in which the error occurred.

0640 HUD Data Quality Report Framework - v9

- Review every 6 months for the HUD reporting period (10/1--9/30).
- Self-run (requires ART license), **or** request from KnoxHMIS.
- Provides a summary with number and percentage of errors by collection stage.
- Detail pages identify Client records with errors and display for each the currently-recorded values for the five, related data elements: Y/N overview question, Start & End Date, Sources and the respective amounts.

Inc YN	Income Source	Start Date	End Date	Amount
N	TANF (HUD)	2/2/2018		142
N	Earned Income (HUD)	8/6/2019		888.83

Q4. Income and Housing Data Quality

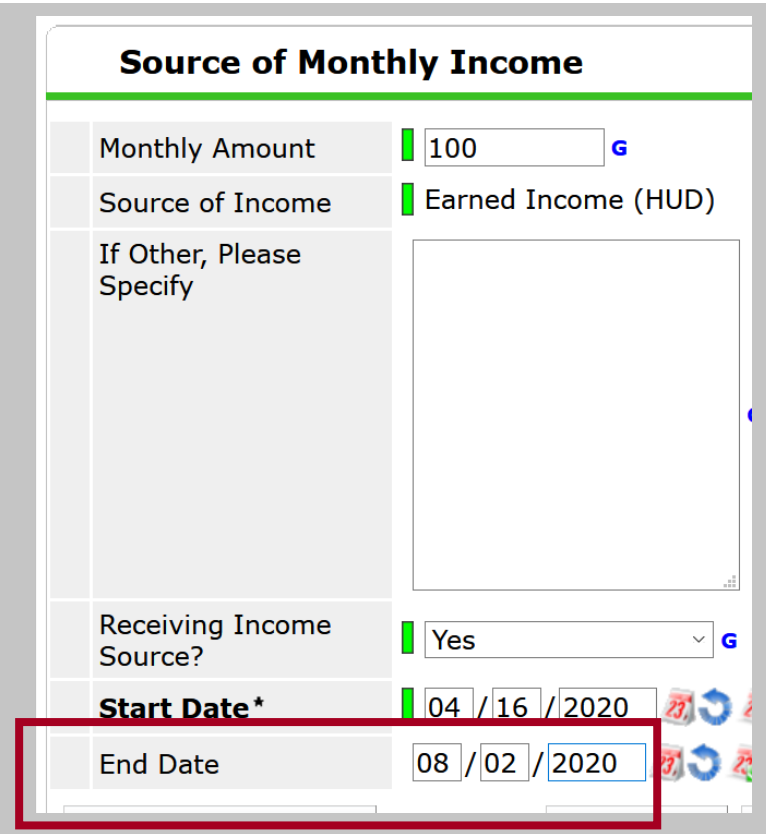
Data Element	Error Count	% of Error Rate
Destination (3.12)	0	0.0%
Income and Sources (4.2) at Entry	1	0.97%
Income and Sources (4.2) at Annual Assessment	0	0.0%
Income and Sources (4.2) at Exit	0	0.0%

FAQs

Q: When a Client gets a raise, do you just change the Monthly Amount for that source in the HUD-V sub-assessment?

A: No—**never change historically accurate data.** Even though it's the same source of income, we need to show change over time for the Client.

1. Open the entry for that Source of Monthly Income. Leave the previous monthly amount and "Yes" for "Receiving Income Source?"
2. **Add an end date,** then click "Save and Add Another."
3. In this new entry, select the same Source of Income and enter the new amount. Choose "Yes" for the "Receiving Income" question (Start Date will default to the system date). Save.
4. Update Total Monthly Income with the new gross.



Q: What if initially-entered income data is incorrect (i.e. wrong start date, income amount or source, etc.), and you correct it in your project entry... Will it also correct the data for the project that entered it?

A:

Best practice is to check with the agency who entered the data. Once you've confirmed that the information is incorrect, you then clean up the bad data, which will correct what was entered by the other agency.

This communication makes the other project aware of any change, validates the data, and enables both agencies to better coordinate care for the Client.

Q: What if I find open entries for really OLD income?

A:

Leave historical answers, but add an end date. At one point in time, the Client *was* receiving that income.

Deleting historical answers can negatively affect reports for your project, other open/ active projects for the Client, as well as the CoC.

For help, contact HMISsupport@utk.edu!

REFERENCES

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