



SERVICEPOINT 5.12.X

INCOME ENTRY

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PURPOSE

The purpose of this workflow document is to describe the income entry and updating process within Entry/Exit in ServicePoint (HMIS). The workflow suggested in this document aligns with HUD Specifications and Bowman System's (HMIS Vendor) guidance.

SCENARIO EXAMPLES:

If an existing (in HMIS) client comes to your project with no income and the information has already been verified (HUD Verification Link reflects the green check mark) by another agency and all sources are set to know. What do you do?

- If the client does not have any income, and the information has already been verified, do NOTHING. No changes to income at this time.

If an existing client comes to your project WITH income and this information has been verified by your agency with documentation with NO change to that client's income, AND the information is correct. What do you do?

- Do nothing. If the income information is still correct and this has been verified by your agency, leave the income information above.

If an existing CoC client comes to your project and the client reflects an income, BUT this information is now different (maybe it's more or less). What do you do?

- End the previous income as of the day BEFORE you know it to be true (normally during entry). Example: If Entry is 11/1/2016, then the income should be ended as of 10/31/2016 and a NEW income should be added as of 11/1/2016 with the correct amounts. Leave existing income with no end-date and it should be set to "yes". Please be sure to update the Total Monthly Income as well.

If an existing CoC client comes to your project and they reflect in HMIS that they DO have income based on another agency's data entry, however, the client has lost income when they come into your project. What do you do?

- End the previous income (i.e. earned income) as of the day before they enter your project (as mentioned above), then add the new income type (earned income) with a "No" and leave End-Date blank.

HOW TO UPDATE BENEFITS AND INCOME SOURCES

Should a user have to update benefits and income sources for clients, follow these steps do capture these changes appropriately. In the example below, we'll go over "Income", however, all other sources are updated similarly by following these steps:

- » Income from any source last 30 days? –
 - ▶ Leave at "Yes" if the Client continues to receive income
 - ▶ Change to "No" if the Client no longer receives income AT ALL
 - ▶ Change to "Yes" if the Client began receiving income and answer was set to "No"
- » Click the magnifying glass on the left-hand side of the sub assessment (See Figure 1)

INCOME INFORMATION (MUST BE VALIDATED)

Income from Any Source Last 30 days? G

Monthly Income HUD Verification

	Source of Income	Receiving Income Source?	Monthly Amount	Start Date *	End Date
	Worker's Compensation (HUD)	No		10/17/2016	
	VA Service Connected Disability Compensation (HUD)	No		10/17/2016	
	VA Non-Service Connected Disability Pension (HUD)	No		10/17/2016	
	TANF (HUD)	No		10/17/2016	
	Unemployment Insurance (HUD)	No		10/17/2016	

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

Total Monthly Income (MUST BE VALIDATED) G

Figure 1

- » Click the Receiving Income Source? Question link (1) to sort all "Yes" answers and bring to the top. Then, click on the pencil (2) to the left of the income source that needs to change. (See Figure 2)

Show All Monthly Income Records								
Monthly Income								
	Provider	Date Effective	Source of Income	Receiving Income Source?	Monthly Amount	Start Date	End Date	
	Osceola County ESG-RRH (760)	10/17/2016 1:29:12 PM	Child Support (HUD)	Yes	US\$150.00	10/01/2016		
	Osceola County ESG-RRH (760)	10/17/2016 1:29:12 PM	Alimony or Other Spousal Support (HUD)	No		10/17/2016		
	Osceola County ESG-RRH (760)	10/17/2016 1:29:12 PM	Earned Income (HUD)	No		10/17/2016		
	Osceola County ESG-	10/17/2016	General					

Figure 2

- » On the End Date Calendar field enter the date PRIOR to the effective date of the new income. Example: If the new income is effective 10/17/2016, the End Date field for the “previous” income should be 10/16/2016. DO NOT change the “Receiving Income Source”. The previous income should be left at “Yes”.
- » Click Save (See Figure 3)

Edit Recordset - (25) Client, RRH

Monthly Income

Source of Income: Child Support (HUD) G

If Other, Please Specify:

Receiving Income Source?: Yes G

Monthly Amount: 150 G

Start Date *: 10 / 01 / 2016 G

End Date: 10 / 16 / 2016 G

If the income was true, leave at "Yes" even if the income even after adding an end date. Date should be the day PRIOR to the new income effective date

Figure 3

- » Click Add at the bottom of the Monthly Income popup
- » A new popup will display
- » Select the Source of income within the Monthly Income Recordset popup

- » Answer Receiving Income Source – if they are receiving the income, it should be set to Yes.
- » Monthly Amount
- » Start Date – Should be the day AFTER the prior income was changed (if income ended 10/16/2016, the new income should be 10/17/2016)
- » Leave End Date blank
- » Click Save (See Figure 4)

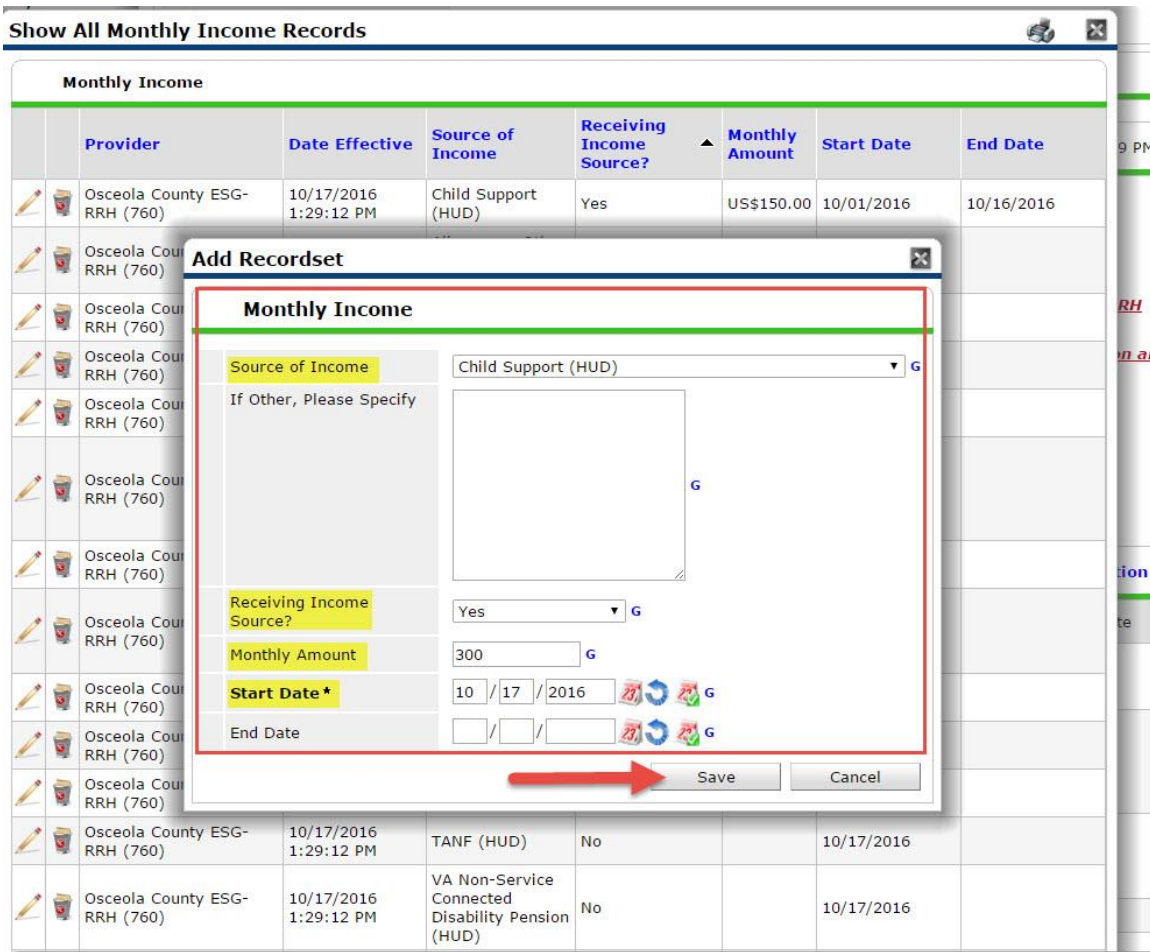


Figure 4

- » The rest of the sub-assessments must be updated in the exact same way. Whether the benefit or income is increasing, ending or starting – the original answer must be ended prior to adding the new source.

VERY IMPORTANT: If a client comes to your project with an already established income that was entered at another agency and the income is still correct, DO NOT CHANGE! This income should remain the same even if it was entered by another entity. ONLY change if the income is no longer true.

On the same note, if a client comes with answers to benefits as “No” (another went through the HUD Verification process and all sources were set to “No”), and now some of these benefits or income sources are true, the “No” answer MUST BE ENDED (add an End Date to within the Date Field – remember, day before the new income starts) then the new source, with “Yes” answer must be added following the same process as above.



DOCUMENT HISTORY

Date of Revision	Document Version #	Revision Notes
2016/11/14	V01	First Release of Document