

HPRP/HMIS Tip of the Week 7

Quick Guide to Dates in HMIS

In our HMIS, we are bombarded with date fields, some of which have times attached, some that have to match others, yet they all have to somehow match up with a reality that is sometimes more complex than can be accounted for in HMIS. This Tip of the Week will hopefully make sense of this web of dates we must enter to keep our data as accurate as possible.

Assessment Date

WHERE: The assessment date is the first date field you encounter when entering a client (unless you searched by birth date). When you first create your client, you will see on the Profile page (and on the Assessments page) a field labeled "Assessment Date" and then you can see the "BackDate" button following it.

WHAT: The assessment date refers to the date your client was approved to receive HPRP funds. If the time between you sitting down with them initially and the time they were approved is significant, you would need to re-verify all the assessment data you have on the client before entering them into the HMIS.

RELATION TO OTHER DATES: This date should match your Entry Date.

Birth Date

WHERE: This field is located on the search screen, the profile tab, and in both assessments.

WHAT: Obviously, this is the date the client was born. If a birth date is unknown or the client doesn't want to share their exact birth date but is ok with you entering an approximate birth date, this is ok. Put in an approximate birth date and choose "Approximate" as the Date of Birth Type. If the client does not want to have his/her birth date shared at all, leave the field blank and choose "Refused" in the Birth Date Type field.

"Added to System" Date

WHERE: The Added to System Date is not a field, technically. It is shown on the Profile page of the client just above the client name.

WHAT: This date cannot be altered and refers to the date the client was entered into the HMIS for the first time. You should not enter a client into HMIS until the client has been approved for HPRP funds. This date is used by ODOD to determine how long it is taking your agency to enter clients from the time they entered your program.

Entry Date

WHERE: This field is found by clicking the orange/brown "Entry/Exit" button in the row of buttons across the top level with the client name and ID. Click on "Add Entry/Exit" to see this date field. It is located in the Entry Data section.

WHAT: Your entry date refers to the date the client entered your program.

RELATION TO OTHER DATES: This date must be the same as your Assessment Date. Also the date and time must **precede** your Service Transaction Start & End Date and time.

Exit Date

WHERE: This field is found by clicking the orange/brown "Entry/Exit" button in the row of buttons across the top level with the client name and ID. If you are entering an Exit Date, there should be an entry already entered, so you would click the pencil on the Exit side of the Entry Date.

WHAT: The Exit Date refers to the date your client left your program. The Program Exit Date may be the same as the Program Entry Date if participation begins and ends on the same day (e.g., in the case of a one-time payment for arrears, a security deposit, or one month of rental assistance). For a program participant receiving ongoing assistance for two or more consecutive months, the Program Exit Date should be equivalent to the last day of the last month for which the rental assistance payment applies.

RELATION TO OTHER DATES: The Exit Date and time must come after your Entry Date and time. This date and time must come after the latest Service Transaction Start & End Dates and times.

Income Start Date

WHERE: This field is located in the HPRP Assessment (and HUD-40118) inside the Income Subassessment. To find it, scroll down in the assessment to the section labeled "Monthly Income". Click the button on the right that says "Add". You will see these date fields here.

WHAT: The Start Date in the Income Subassessment defaults to today's date. If the client did not receive the income source you have selected, let this default remain. If the client did receive the income source you have selected, you will enter the date that would be 30 days prior to the Assessment Date. It refers to the 30 Day Income field, and gives the database the timeframe that that amount applies to. (Exception: please read Income End Date example.)

Income End Date

WHERE: This field is located in the HPRP Assessment (and HUD-40118) inside the Income subassessment. To find it, scroll down in the assessment to the section labeled "Monthly Income". Click the button on the right that says "Add". You will see these date fields here.

WHAT: The End Date in the Income subassessment refers to the date the income from the specified income source ended. It is used only when there has been a change in a client's income. For example, a client has been assessed, and they currently have \$500 of Earned Income in HMIS. However, they have gotten a raise and as of the 1st of the month, they are now earning \$700. You verify this with a paystub, and navigate to the Income subassessment. Find the Earned Income record with the \$500. Here is where you will use the End Date field because you are ending this income (and will start a new one). Enter the date the client last received this \$500/month rate of pay. In this case, it would be the last day of the prior month. Choose Save and Add Another, then enter \$700 for Earned Income with at Start Date of the 1st of the month, even if it's not 30 days prior to the Assessment Date.

Non-cash Start Date

WHERE: This field is located in the HPRP Assessment (and HUD-40118) inside the Non-Cash Benefits subassessment. To find it, scroll down in the assessment to the section labeled "Non-Cash Benefits". Click the button on the right that says "Add". You will see these date fields here.

WHAT: This field refers to the date the benefit began. If the client does not know, estimate.

Household Date Entered

WHERE: To find the Household Date, go into your client's record, click the Household Information link to expand the household section, then click "Add New Household". The date field is here.

WHAT: The Household Date refers to the date the household information you are entering is true. Household information is a moving target and is not always true for the client forever. This date is meant to capture the date this particular mix of people was together as a household. If you think of a household as a snapshot of a family, this would be the date attached to that image.

RELATION TO OTHER DATES: This date should always match the entry date. Beware: even if you are in backdate mode, this date does not automatically default to that assessment date, so you will need to edit it manually. Also: if a baby is born into a household after the entry date, that baby will still share the other household members' Household Date Entered.

Household Date Removed

WHERE: To find the Household Date, go into your client's record, click the Household Information link to expand the household section, then click "Add New Household". The date field is here.

WHAT: Refers to the date a client was removed from the household. This field is ONLY used when a household loses a member *while the household is in your program*. In this case, the client removed from the household would get a Date Removed and you would leave the rest of the household untouched. This field is NOT to be used to adjust an existing household when you are adding a new entry. In a case like that, please ADD NEW HOUSEHOLD.

Service Transaction Start & End Dates

WHERE: To find the Service Transaction Start and End Dates, go into your client's record, click "Service Transactions" in the tabs up top, and click "Multiple Services". Your Start and End Date fields automatically match. If you enter a start date/time, the end date/time will change to match that date/time.

WHAT: The Service Transaction Start & End Dates refer to the date the service was given to the client. It does not refer to the dates the services are covering the client's needs. So if we are talking about a check, it is the date you give or mail the check to the client/landlord/utility. If we are talking about an assessment (case management), it is the date they brought in the last bit of information you needed to have complete paperwork.

RELATION TO OTHER DATES: These dates must fall between your Entry Date and your Exit Date.

Service Transaction Financial Assistance Start Date

WHERE: To find the Service Transaction Financial Assistance Start Date, go into your client's record, click "Service Transactions" in the tabs up top, and click "Multiple Services". This date is located after the Financial Assistance dropdown field and before the Source and Cost information.

WHAT: The Service Transaction Financial Assistance Start Date is meant to record the first day that the financial service took effect, or started helping the client. So if we are talking about rental assistance for the month of July, it would be 7/1/2010. If we're talking about a utility deposit and the utilities are getting turned on on July 18, this date would be 7/18/2010. For rental assistance arrearages paying May and June rental assistance together, the date in this field would be 5/1/2010.

RELATION TO OTHER DATES: This date does not have to be before or after any particular date. It is assumed that utility payments and rental assistance payments are good for about 30 days, so there is no need to enter the non-existent "Financial Assistance End Date" anywhere.

Comments, questions, and feedback are welcome. If you would like to not receive "HPRP HMIS Topic of the Week" anymore, or would like to be included, please email genelledenzin@cohhio.org.