

## QRG - Income and Resources – Data Element 4.02

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**WHAT IS A QRG** – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-8 page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps.

**WHAT THIS GUIDE IS ABOUT** – HUD Data Element 4.02 Income and Sources determines whether households are accessing all income sources that they are eligible for and allows the CoC to compare changes in income between project start and exit.

Increase in income is a key performance measure of programs.

#### COLLECTION POINT

- Entry Assessment—Project Start
- Annual Assessment—30 days before/after HoH’s anniversary date
- During Assessment— Changes to income
- Exit Assessment—Project Exit

#### DATA COLLECTION GUIDANCE FOR ADULTS (Age 18 and older)

If there is a “yes” response to “Income from any source” then at least one source of income must be identified for each adult and minor HoH.

CoC, ESG and SSVF-funded projects are instructed to *exclude* income from the employment of a minor child from calculations of household income.

As a general rule, any income associated with a *minor* used for household *expenses and support* should be **included** in the head of households *Income and Sources* record. Where the income is not relevant for household expenses, it could reasonably be **excluded** from entry.

If a client's income information was recorded incorrectly, edit the information using QRGs available at: <http://www.kcmetrohmis.org/qrg.htm>

**DATA COLLECTION GUIDANCE FOR MINORS (Age 17 and under)**

Updates are required for persons aging into adulthood. A new *Income and Sources* record must be created for the 18-year-old client reflecting any income associated with that client.

**DATA COLLECTION EXAMPLES**

Income data should be recorded only for sources of income that are *current*.

Client Case Scenario	HUD Financial Assessment Data Entry in HMIS
Client lost their job and hasn't found a new one.	Because the client is not working <i>currently</i> , the <i>latest</i> HUD Financial Assessment for the client will reflect ' <b>No</b> ' income.
Client's most recent paycheck was 2 weeks ago from a job in which the client was working full-time for \$15/hr, but the client is currently working 20 hours per week for \$12 hour.	The client's current job is 20 hours and \$12 hours a week.  The <i>latest</i> HUD Financial Assessment for the client will reflect— <ul style="list-style-type: none"> <li>• Earned Income: <b>\$1,040/mo</b></li> </ul> <i>Formula used: (\$12/hr x 20 hrs x 4.333 weeks)</i>
17-year-old works part-time and uses her \$648 monthly income to help with household expenses.	The client is a <i>minor</i> <b>and</b> her income contributes to <i>household expenses</i> which means it <b>needs</b> to be <i>included</i> as part of the household income.  To include the minor's income as part of the household's income, add the income to the <b>HoH's latest</b> HUD Financial Assessment to reflect the additional income: <b>\$648/mo</b>
Client receives \$820 in unemployment income, \$630 a month in child support and \$120 for alimony.	The client has multiple sources of income. Although the child support is for the minors, the guardian is the one receiving and managing the funds.  The <i>latest</i> HUD Financial Assessment for HoH will reflect all income sources— <ul style="list-style-type: none"> <li>• <b>Unemployment income: \$820/mo</b></li> <li>• <b>Child support: \$630/mo</b></li> <li>• <b>Alimony: \$120/mo</b></li> </ul>

<p>HoH’s child turned 18 years old. Since their 18<sup>th</sup> birthday, HoH no longer receives \$220/mo in child support and 18-year-old is now working full-time (\$834/mo).</p>	<p>A few things are happening in this scenario. The child is now an adult and needs a new HUD Financial Assessment recorded in HMIS to reflect the changes. At the same time, the HoH’s income is also changing due to the loss of monthly child support.</p> <p>Both clients need to have their income information updated in HMIS—</p> <ol style="list-style-type: none"> <li>1. The <i>latest</i> HUD Financial Assessment for <b>18-year-old</b> will reflect their new income—             <ul style="list-style-type: none"> <li>○ <b>Earned income: \$834/mo</b></li> </ul> </li> <li>2. The <i>latest</i> HUD Financial Assessment for <b>HoH</b> will reflect \$200/mo <b>less</b> in child support.</li> </ol>
<p>Child receives \$771 a month in SSI.</p>	<p>Although the cash benefit is for the child, the guardian is the one receiving and managing the funds.</p> <p>The <i>latest</i> HUD Financial Assessment for HoH will reflect the child’s SSI benefit—</p> <ul style="list-style-type: none"> <li>● <b>SSI: \$771/mo</b></li> </ul>
<p>16-year-old household family member mows lawns in the neighborhood and makes \$100 a month.</p>	<p>The client is a <i>minor</i> and their earnings are <b>not</b> used for <i>household expenses</i> which means it is <b>excluded</b> from the household income and does not need to be entered in HMIS.</p>
<p>17-year-old runaway homeless youth is the HoH and works full-time as a cashier and makes \$10/hour.</p>	<p>The client is a RHY <i>minor</i> <b>and</b> she is the HoH which means the same data collection as adults applies to her.</p> <p>The <i>latest</i> HUD Financial Assessment will reflect—</p> <ul style="list-style-type: none"> <li>● <b>Earned Income: \$1,733/mo</b></li> </ul> <p><i>Formula used: (\$10/hr x 40 hrs x 4.333 weeks)</i></p>

**COMMON ERRORS**

Use the following table to avoid the most common errors for income and benefits:

Common Error	Clarification and Guidance
No income	<p>If the client has no income, use the "No" response for the field <i>Income from any source</i>.</p> <p>Do not use this field to indicate the client has <i>no income</i> (placing \$0 in the field).</p> <p>If you accidentally select “no” income and enter income information, the data will <b>not</b> save on the assessment.</p>
Income intervals	<p>If you enter an <i>hourly</i> dollar amount, HMIS will automatically calculate the monthly amount for a full-time position. There is <i>not</i> a field to enter the number of hours a client works per month.</p> <p>For accuracy, use a different income interval (weekly, monthly, annual, etc.)</p>
Estimating income amounts	<p>When a client has income, but does not know the exact amount, the income amount should be <b>estimated</b>.</p>
Not sources of income	<ul style="list-style-type: none"> <li>• Programs services, gift cards, vouchers</li> <li>• Student financial aid is not to be considered income unless it’s a cash stipend.</li> <li>• Lump sum amounts—inheritance, settlements, sales, back pay SSA</li> </ul>
Proof of income or benefits	<p>Clients are not required to provide documentation of income or benefits unless stated by a funder.</p>

**SOURCES**

Program Specific Data Elements (PSDE) [https://www.hudexchange.info/programs/hmis/hmis-data-standards/standards/Program\\_Specific\\_Data\\_Elements.htm](https://www.hudexchange.info/programs/hmis/hmis-data-standards/standards/Program_Specific_Data_Elements.htm)

Data Dictionary: <https://files.hudexchange.info/resources/documents/FY-2022-HMIS-Data-Dictionary.pdf>