

New Quarterly Assessment Policy Changes

To make it easier for HMIS users to know when their client’s assessments are due, the quarterly assessment policy was recently updated. As of **February 1, 2025** Current Living Situation Assessments (CLS) and Status Update Assessments have shifted from being required every 90-days starting from the program enrollment date to **now** being **required** during each of the four newly designated assessment months – **February, May, August, and November**.

In other words, going forward users will no longer need to track the dates that assessments are due because of the different client enrollment dates. Users are now required to submit assessments for ALL clients, *regardless of when they were enrolled*, **four times** in a year during these months.

Months	Enrollment	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Current Living Situations (CLS)	Yes	No	Yes	No	No	Yes	No	No	Yes	No	No	Yes	No
Status Updates	No	No	Yes	No	No	Yes	No	No	Yes	No	No	Yes	No

Months	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Example #1 Enrolled: 6/7/2024	No	Yes Both	No	No	Yes Both	No*	No	Yes Both	No	No	Yes Both	No
Example #2 Enrolled: 1/27/2025	Yes Enrollment CLS*	Yes Both	No	No	Yes Both	No	No	Yes Both	No	No	Yes Both	No
Example #3 Enrolled: 4/30/2025	n/a	n/a	n/a	Yes Enrollment CLS*	Yes Both	No	No	Yes Both	No	No	Yes Both	No

How to Stay on Track – *Coming Soon*

To assist in this, Housing for Health has created a Quarterly Assessment report that can be found in HMIS using the Data Analysis tab under the Santa Cruz System Reports.

Status Assessment Type	November 2024 Assessment Status	February 2025 Assessment Status	May 2025 Assessment Status	August 2025 Assessment Status	November 2025 Assessment Status
1 Current Living Situation	Yes	No	No	No	No
2 Current Living Situation	Yes	No	No	No	No
3 Current Living Situation	No	No	No	No	No
4 Current Living Situation	No	No	No	No	No
5 Current Living Situation	Yes	No	No	No	No
6 Current Living Situation	Yes	No	No	No	No
7 Current Living Situation	No	Yes	No	No	No
8 Current Living Situation	No	Yes	No	No	No
9 Current Living Situation	No	Yes	No	No	No
10 Current Living Situation	No	Yes	No	No	No
11 Current Living Situation	No	Yes	No	No	No
12 Current Living Situation	No	No	No	No	No
13 Current Living Situation	Yes	No	No	No	No
14 Current Living Situation	Yes	No	No	No	No
15 Current Living Situation	Yes	No	No	No	No
16 Current Living Situation	No	Yes	No	No	No
17 Current Living Situation	Yes	No	No	No	No
18 Current Living Situation	Yes	No	No	No	No
19 Current Living Situation	No	No	No	No	No
20 Current Living Situation	Yes	No	No	No	No
21 Current Living Situation	Yes	No	No	No	No
22 Current Living Situation	No	No	No	No	No
23 Current Living Situation	Yes	No	No	No	No

Note: *this will only be available for users with Managers licenses or additional Looker/Data Analytics access.*

What's NOT Changing?

Please note this policy change will not impact Annual Assessments, as this is a HUD requirement.

- **Annual Assessments** will still need to be completed every year on the client's enrollment anniversary

If you have any questions on the policy change, please reach out to the Santa Cruz County HMIS Lead Loren White at loren.white@santacruzcountyca.gov.