HMIS Annual Assessment

In HMIS, a client needs an annual assessment when it's been one year since the "Head of Household's Project Start Date," which means an assessment needs to be completed within a 30-day window before or after that anniversary date; essentially, when the client has been enrolled in a project for a full year.

Key Points of the HMIS Annual Assessment Process:

1. **When to Complete the Annual Assessment:**
   - The annual assessment is based on the **Head of Household's** Project Start Date (the date the client enrolled in the project).
   - It must be completed within a **30-day window** before or after the anniversary of that start date.
2. **Head of Household Focus:**
   - The date is always calculated based on the **Head of Household**, even if other family members joined the project at a later time.
3. **Even with No Changes:**
   - Even if there are no significant changes in the client's situation, the annual assessment is still required.
4. **Identifying Clients Needing Annual Assessments:**
   - Clients needing an annual assessment are listed in the **"Status Due"** feature on your caseload.
   - You can access this feature by going to the **Caseload tab** in the HMIS system.

Steps to Complete an Annual Assessment:

1. **Access the Status Due list** of clients from the Caseload tab in HMIS.

2. Click on the client's name in the list.

3. Select the '+' button to start the assessment.
4. If applicable, include household members by sliding the toggle.
5. Select the **Annual Assessment** option.
    a. The system will update the data. Ensure all the details are correct and update where necessary.
6. Save and close the assessment.

Annual Assessment Warnings:

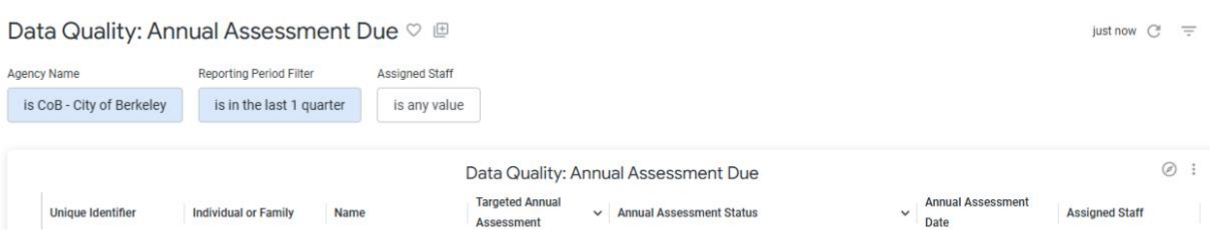
Notifications can be set for when an assessment are due in two ways:

1. Through Program Enrollments:
    a. Make sure you're listed as the assigned staff on the client's enrollment. If not, add yourself.
    b. Toggle on the **"Assessment Due Every Year"** notification option.
2. Through User Account Settings:
    a. Go to your **Account Settings** (by clicking your initials at the top right).
    b. At the bottom of the screen, toggle on the **Assessment Due Warning** and set the timeframe for notifications.

For Liaisons and Program Managers:

Liaisons can view assessments due by using the relevant dashboard to monitor the progress and ensure assessments are being collected in a timely manner.

A reporting dashboard is available: Data Analysis - Alameda Clarity System Reports – Data Quality-> **Data Quality: Annual Assessment Due**



Annual Assessment Status:

Assessment Window Opening in 30 Days or Less - Assessments at regular intervals for all active clients. Annual Assessments are to be completed anytime from 30 days prior to 30 days after the enrollment date.

Past Due - The client's Annual Assessment window has passed.

Fix this error for clients that were active in the reporting period you are checking for errors in by completing an Annual Assessment for the client with information as of a date inside HUD's Annual Assessment range of 30 days prior or 30 days after the one year anniversary of the Head of Household's *Project Start Date*.

Due - The client's Annual Assessment window is now.

Fix this error by completing an Annual Assessment before the range of 30 days prior or 30 days after the one year anniversary of the Head of Household's *Project Start Date* is over.

Completed Out of Range - The client's Annual Assessment was completed outside of the +/- 30 day window of the Head of Household's *Project Start Date*. HUD Reports will consider this Annual Assessment as missing because it fell outside of the required range.

Fix this error for clients that were active in the reporting period you are checking for errors in by completing an Annual Assessment for the client with information as of a date inside HUD's Annual Assessment range of 30 days prior or 30 days after the one year anniversary of the Head of Household's *Project Start Date*.

Project Start Date before HoH Start Date - it indicates an error in data entry. The Head of Household enrollment start date is before the Project Start Date.

No Targeted Annual Assessment - it indicates an error in data entry. Possible issues: Duplicate enrollment in same program. Data quality issue preventing a HoH from being identified.