Assessments

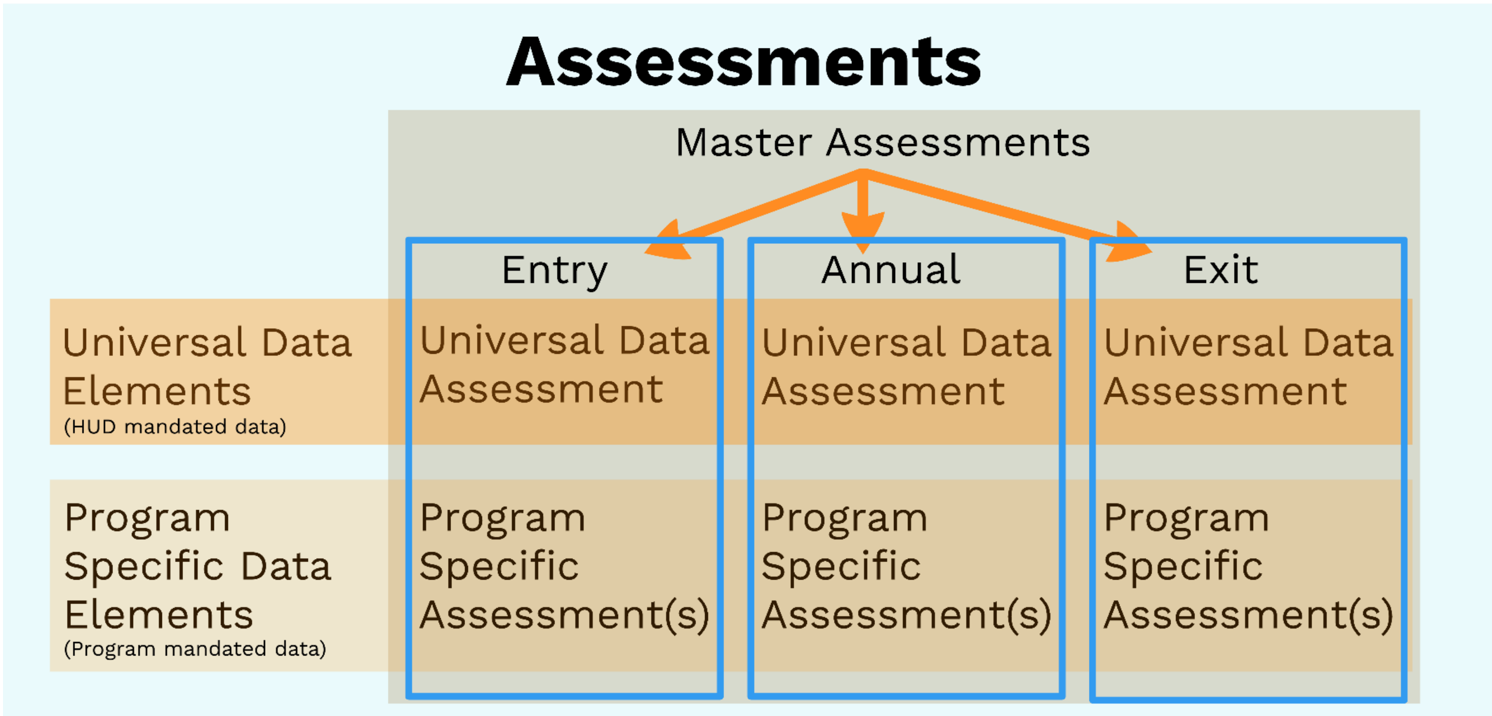
Assessments* in ClientTrack is a data collection tool designed to accommodate data collection needs by both HUD (Universal Data Elements) and specific program requirements (Program Specific Data Elements).

**For more information on the Assessment folder in ClientTrack's Client Workspace, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/*Assessments: Folder

A "Master Assessment" form creates an "Assessment ID" which ties Universal Data Element Assessments (Universal Data Assessments) with Program Specific Data Element Assessments (Program Specific Assessments). This is why it is so important to assess clients using a Master Assessment rather than using an "a la carte" approach – otherwise any information captured will not populate correctly on specific reports. When navigating through built-in workflows*, the Master Assessment is used.

**For information and instructions on navigating through ClientTrack Workflows, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows/*Navigating through a Workflow in *the* "HMIS Basic User 2025 Manual".

Master Assessments include an Entry Master assessment, an Annual Master Assessment (if applicable), and an Exit Master Assessment.



Assessments in ClientTrack

Editing Assessments

When to Edit Assessments

Data is captured in three main points in time for a client enrolled in a program: once at entry (enrollment), during the enrollment (either an annual assessment or update) and upon exit from a program.

Assessments are chronological and shouldn't be edited. Edit assessments only due to user error or due to incorrect information received by a client.

For more information and help editing assessments, reach out to the HMIS Team at hmis@changinghomelessness.org.

Examples of When an Assessment May or May Not be Edited

Scenario #1: A case manager enrolled a client into the SSVF Homeless Prevention Program on March 3rd, 2025. At the time, the client reported that the except for themself, the rest of the family had no health insurance. The case manager finds on March 21st, 2025 that the family is in fact insured under Medicaid and has been since 2023.

Logic: Since the client's family was insured with Medicaid since 2023, that means the client's family was insured at the point they were enrolled into the program. You would edit the enrollment workflow to correct this information.

Scenario #2: A case manager enrolled a client into the SSVF Rapid Rehousing Program on April 8th, 2025. The client reported that the except for themself, the rest of the family had no health insurance. You find out on April 30th, 2025 that the family is now covered by Medicaid.

Logic: Since the client's family was not insured at the point they were enrolled into the program, the case manager would not update a previously completed workflow or assessment.   Instead, the case manager would use "Update/Annual Assessment"*

**For more information and instructions on annual assessments, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Assessments: Folder/*Annual Assessments

How to Edit Assessments

This section contains information and instructions on editing assessments at the enrollment/entry into the program. Before editing any existing assessment, it must be determined a client's assessment* data captured needs to be edited.

*For information on when to edit assessments for existing enrollments, see Chapter 5: Basics of Entering Data into ClientTrack/Assessments/*When to Edit Assessments

Tips and Tricks - *Editing Existing Assessments*

- Although there may appear to be other ways to edit assessments, using methods other than what is detailed in the HMIS Basic User 2025 Manual or by permission from hmis@changinghomelessness.org may result in data reporting errors.

Steps to Editing an Assessment

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the "Client Workspace".***

** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/*Quick Search *in the* "HMIS Basic User 2025 Manual".

*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using "Find Client" *in the* "HMIS Basic User 2025 Manual".

**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* "HMIS Basic User 2025 Manual".

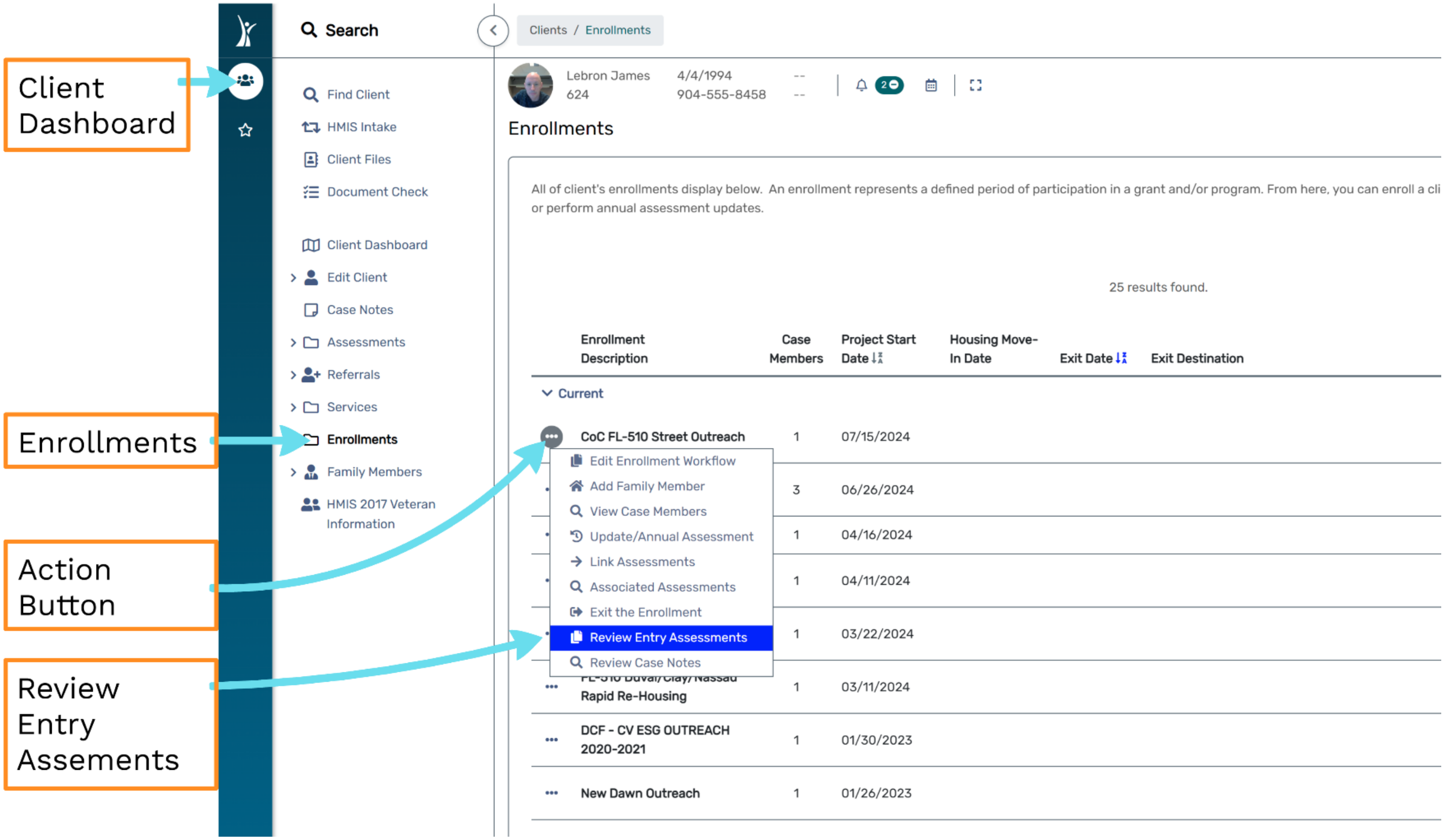
Step 2: Select the "Enrollments" secondary sidebar* menu option. ClientTrack will navigate to the "Enrollments" workspace container.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/*General Page Anatomy and Page Terminology in *the* "HMIS Basic User 2025 Manual".

Step 3: Select the action button* next to the appropriate enrollment. Select “Review Entry Assessments.” If a client has been exited from the program, there will be an additional option to select “Review Exit Assessments.” ClientTrack will navigate to the “Assessment Status” workspace container of the applicable selection.

This will display all the individual assessments that were completed as part of the Intake/Enrollment Workflow for that client. For minors (under 18), fewer assessments are required.

** To view a list of icons and buttons used in Client Track HMIS, see Chapter:1: HMIS ClientTrack Basics/Key Terminology and Navigation/*Icons and Buttons in *the* “HMIS Basic User 2025 Manual”.

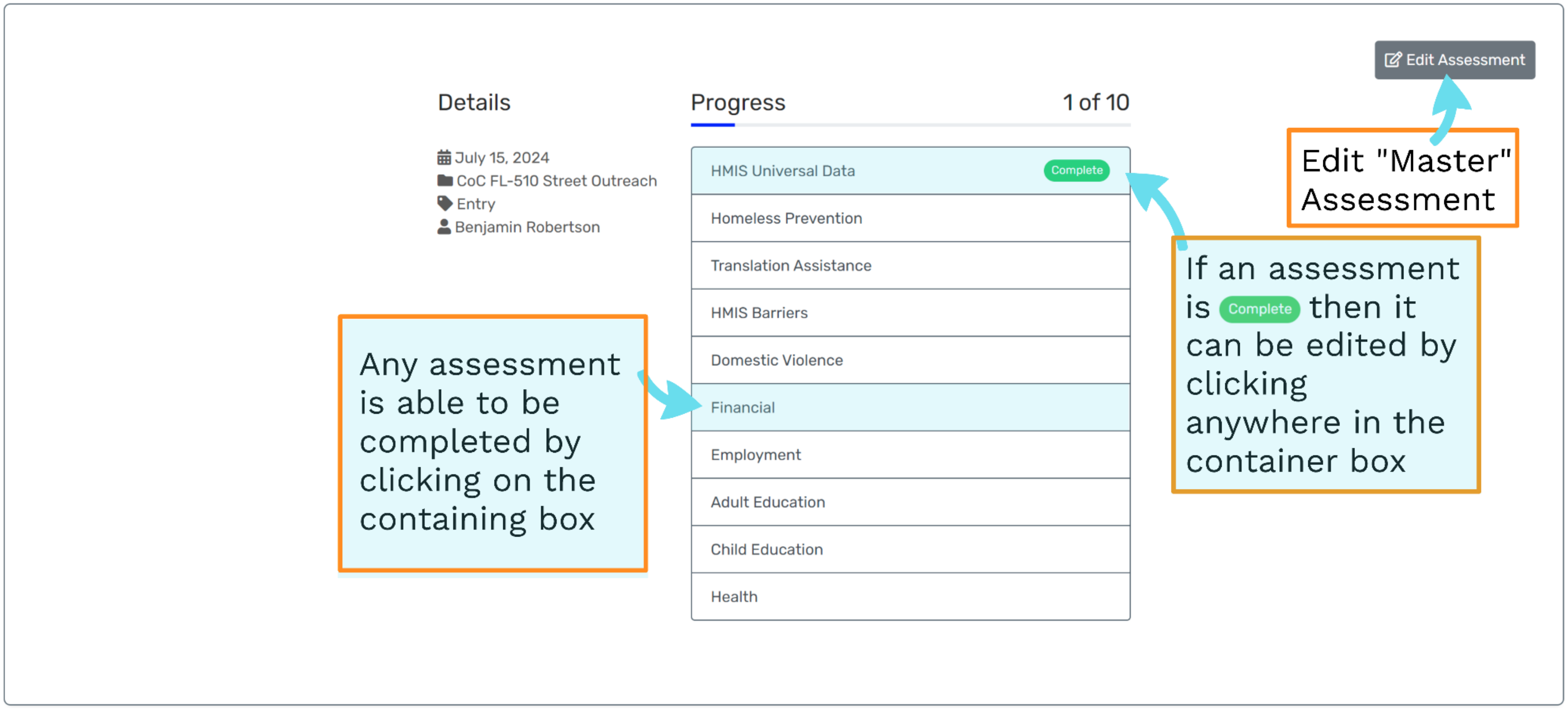


Review Client Entry Assessments

Step 4: Click in the box of the appropriate assessment to edit*. Once the box has been selected, ClientTrack will navigate to the selected assessment form in the workspace container.

**All assessments completed and required in the Intake/Enrollment Workflow (if the Enrollment/Intake workflow was completed) will have a green "Complete" icon to the far right.*

Assessment Status



Editing/Completing Entry Assessments

Step 5: Fill out the assessment form as applicable*. Required elements are marked with a (*).

Step 6: Click "Save" to record any changes. Click "Cancel" to exit without saving. ClientTrack will navigate to the Assessment Status workspace container.