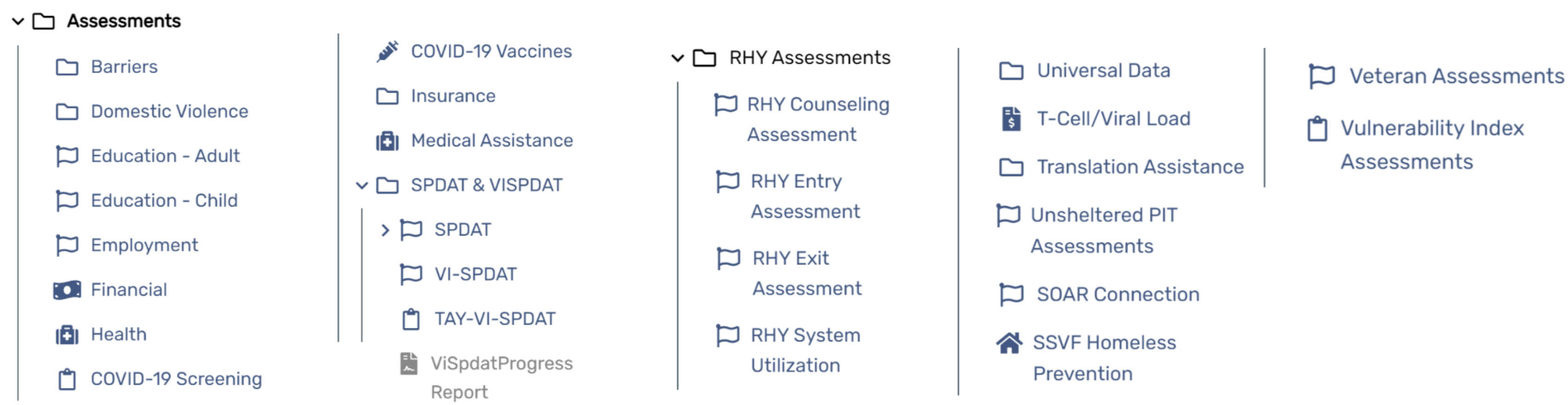
Assessments: Folder

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 how data is captured and managed in assessments, see Chapter 5: Basics of Entering Data into ClientTrack/*Assessments

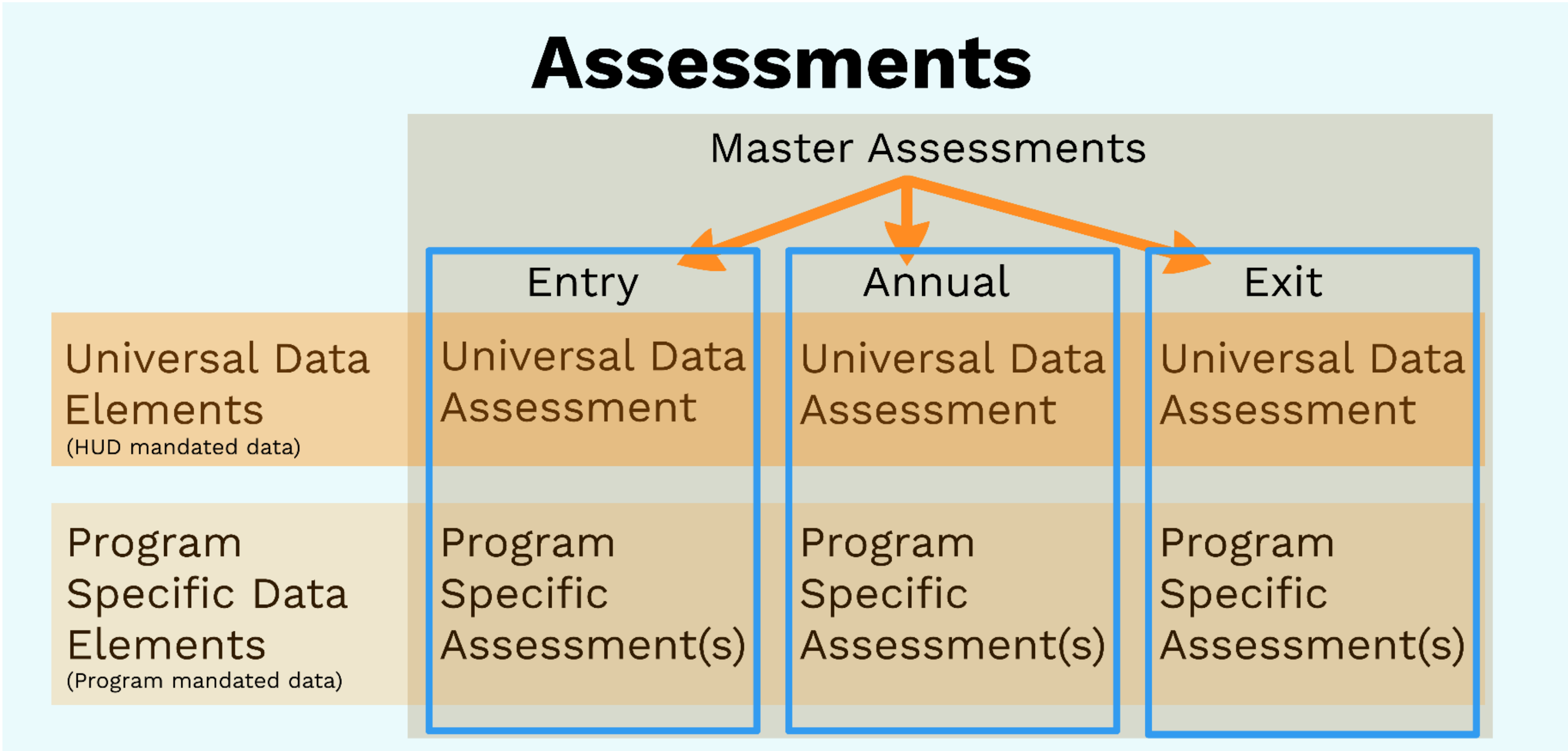


Assessments

Master Assessments

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).

* *For more information on how data is captured and managed in assessments, see Chapter 5: Basics of Entering Data into ClientTrack/*Assessments



Assessments in ClientTrack

<u>Steps to Navigating to Client Assessments Folder</u>

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***.

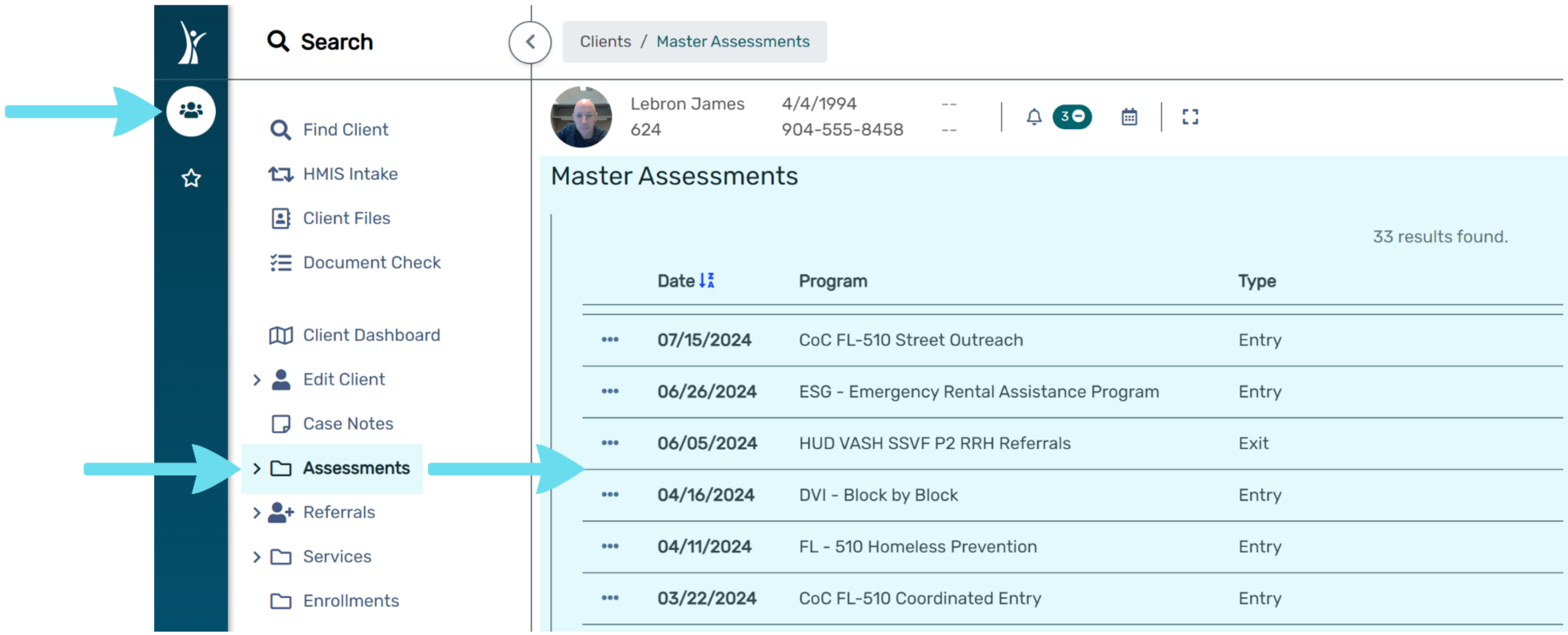
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/*Quick Search *in the* "HMIS Basic User 2025 Manual".

*** 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 "Assessments" secondary sidebar* menu option. ClientTrack will navigate to the "Master Assessments" workspace container, and a dropdown menu will appear under the "Assessments" folder.

**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".



Client Assessments Folder

Viewing Client Master Assessments

Viewing Client Assessments

There are two ways to view assessments.

Method 1 of 2 - Through the “Assessments” folder (Master Assessments workspace container)

** For information and instructions on how to view a client’s master assessment through a particular enrollment, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Master Assessments/*Viewing List of all Client’s Master Assessments for all Client Program Enrollments

Method 2 of 2 - Through the “Enrollments” folder.

** For information and instructions on how to view a client’s master assessment through a particular enrollment, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Master Assessments/*Viewing Master Assessments for Particular Enrollments

Viewing List of all Client’s Master Assessments for all Client Program Enrollments

Steps to View all Master Assessments via the Assessments Folder

This is method 1* of 2 to viewing Master Assessments**.

** For information and instructions on how to view a client’s master assessment through a particular enrollment, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Master Assessments/*Viewing Master Assessments for Particular Enrollments.

***For information on Editing Assessments, see Chapter 5: Basics of Entering Data into ClientTrack/*Editing an Existing Enrollment: Editing Assessments.

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”.***

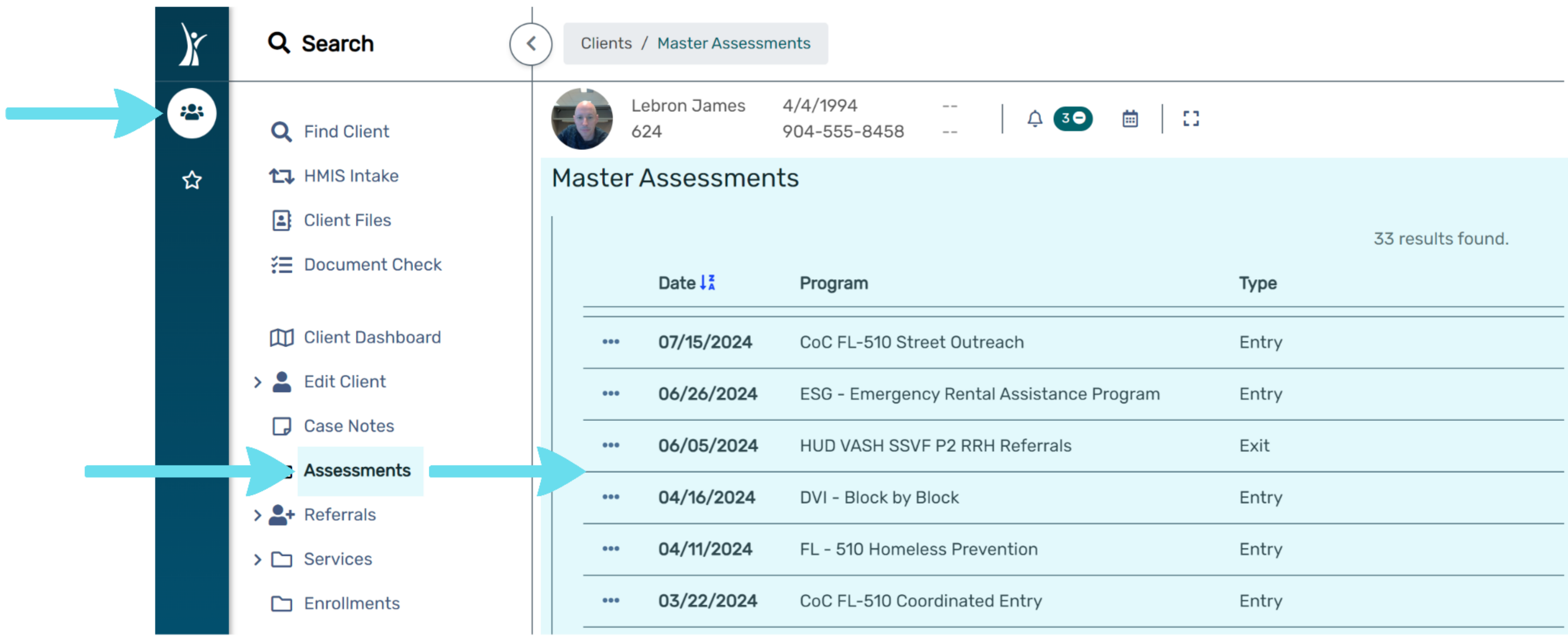
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/*Quick Search *in the* “HMIS Basic User 2025 Manual”.

*** 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 “Assessments” secondary sidebar menu option. ClientTrack will navigate to the “Master Assessments” workspace container*, and a dropdown menu will appear under the “Assessments” folder. This will display a list of all “Master Assessment” workflows (Entry, Annual, During Program Enrollment, Exit).

** 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”.



Client Assessments Folder

Viewing Master Assessments for Particular Enrollments

<u>Steps to View Master Assessments for Particular Enrollments (Entry and Exit*)</u>

This is method 2* of 2 to viewing Master Assessments.**

** For information and instructions on how to view a client's master assessment through a particular enrollment, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Master Assessments/*Viewing List of all Client's Master Assessments for all Client Program Enrollments

***For information on Editing Assessments, see Chapter 5: Basics of Entering Data into ClientTrack/*Editing an Existing Enrollment: Editing Assessments

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".

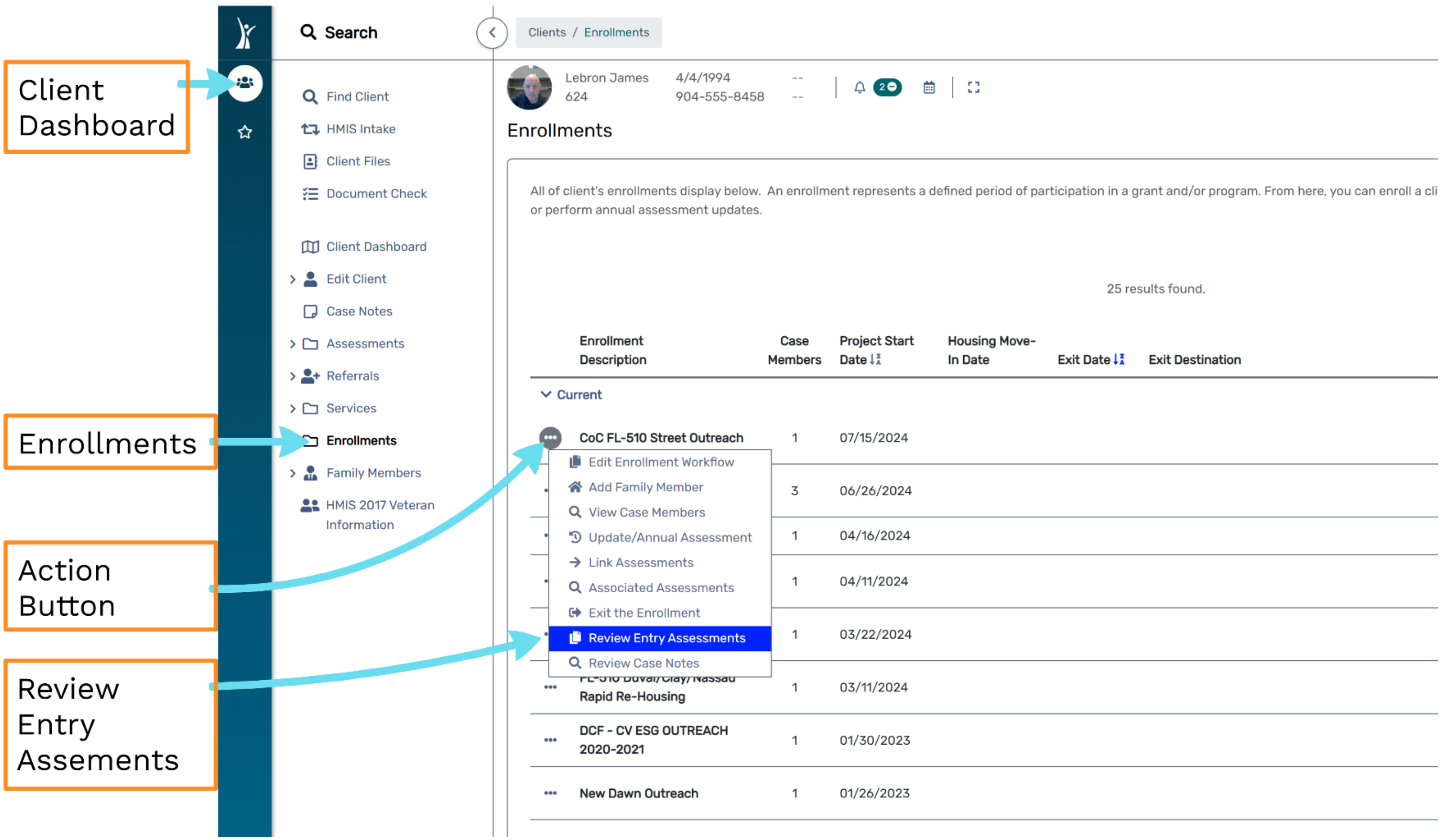
Step 2: Select the "Enrollments" secondary sidebar* menu option. ClientTrack will navigate to the "Enrollments" workspace container.

** 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.

* *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”.

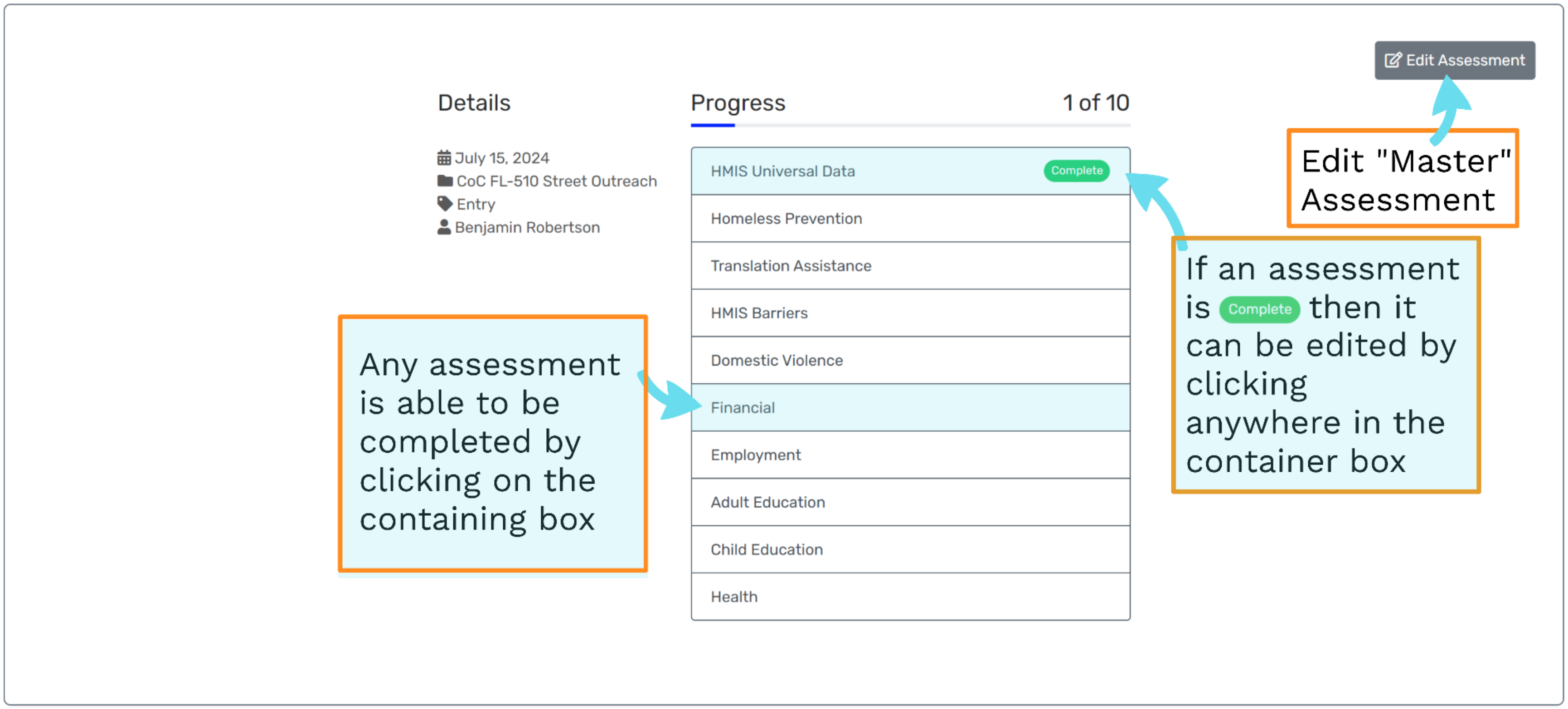
This will display all the individual assessments that were completed as part of the Intake/Enrollment Workflow for that client. For minors (under 18), fewer assessments are required.



Review Client Entry Assessments

Step 4: Click the "Edit Assessment" box in the top right corner of the screen. Once the box has been selected, ClientTrack will navigate to the "Master Assessment" form in the workspace container.

Assessment Status



Editing/Completing Entry Assessments

Viewing List of Client’s Related Assessments

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”.

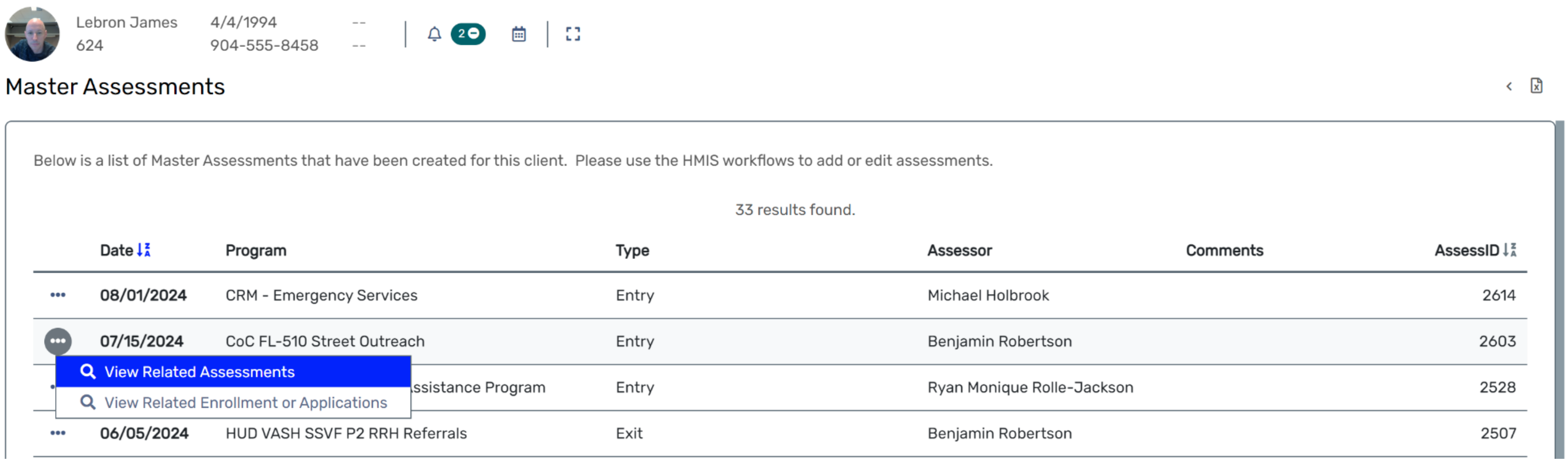
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* “HMIS Basic User 2025 Manual”.

Step 2: Select the “Assessments” secondary sidebar* menu option. ClientTrack will navigate to the “Master Assessments” workspace container, and a dropdown menu will appear under the “Assessments” folder. This will display a list of all “Master Assessment” workflows (Entry, Annual, During Program Enrollment, Exit).

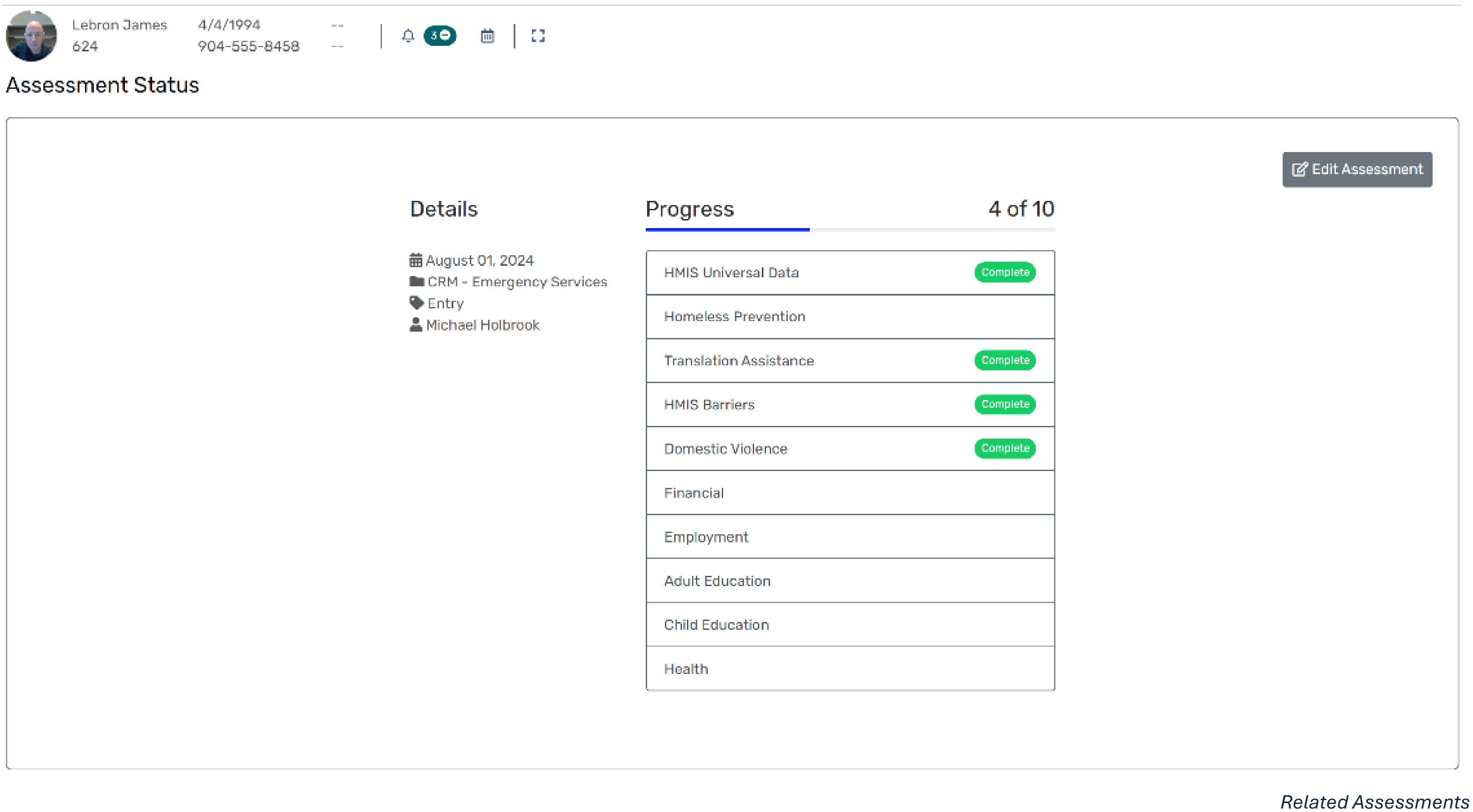
** For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/*General Page Anatomy and Page Terminology in *the* “HMIS Basic User 2025 Manual”.

Step 3: Click on the action button* next to the Master Assessment. Select “View Related Assessments” from the dropdown menu to see a list of which individual assessments within the “Master Assessment” have been completed. The assessments with a green Complete have been completed.

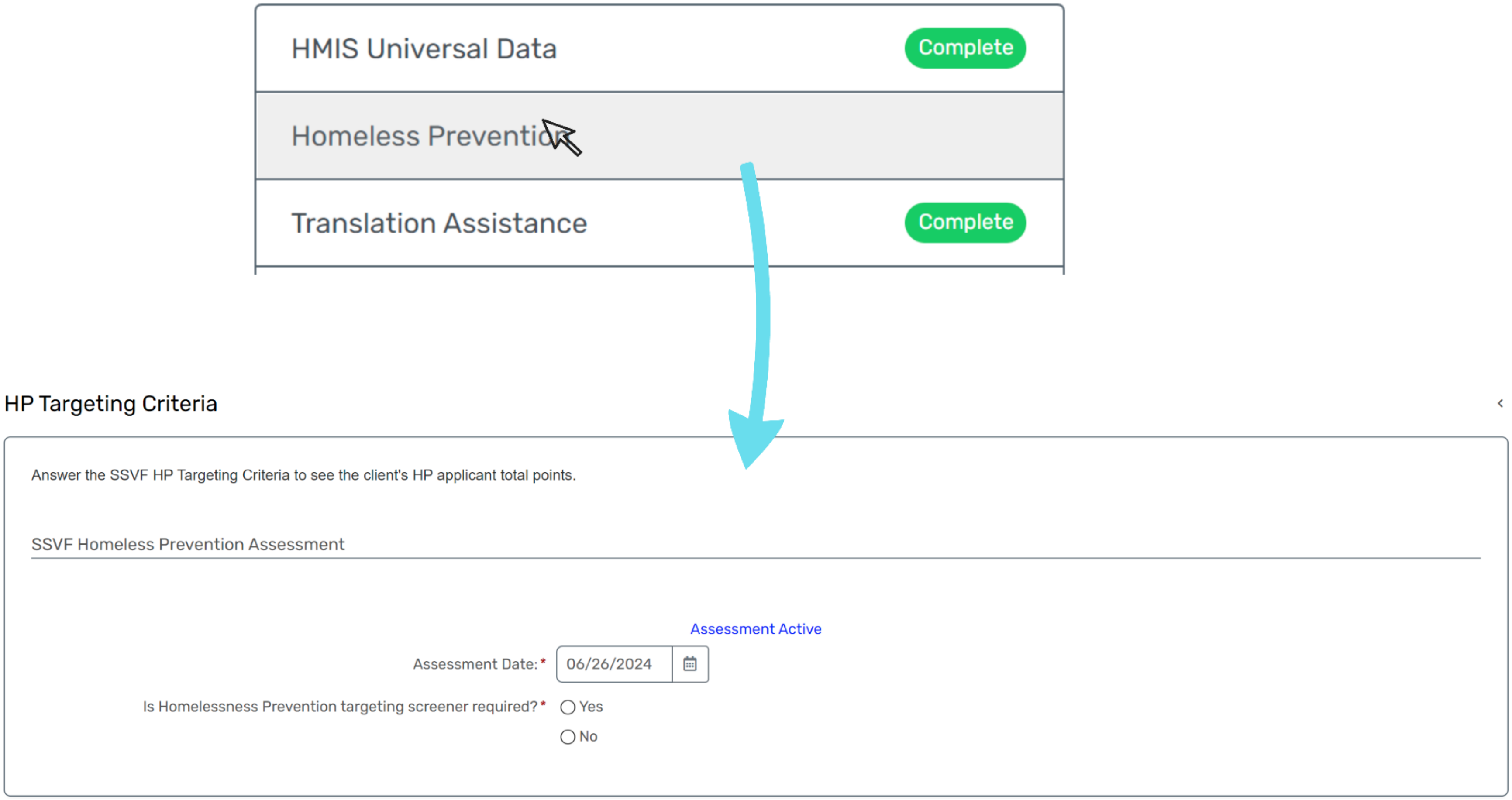
** To view a list of icons and buttons used in Client Track HMIS, see Chapter:1: HMIS ClientTrack Basics/Key Terminology and Navigation/*Icons and Buttons in *the* “HMIS Basic User 2025 Manual”.



View Related Assessments



Step 6: Click anywhere in box of an assessment to have the window pop open the assessment.



Click to Open a Related Assessment