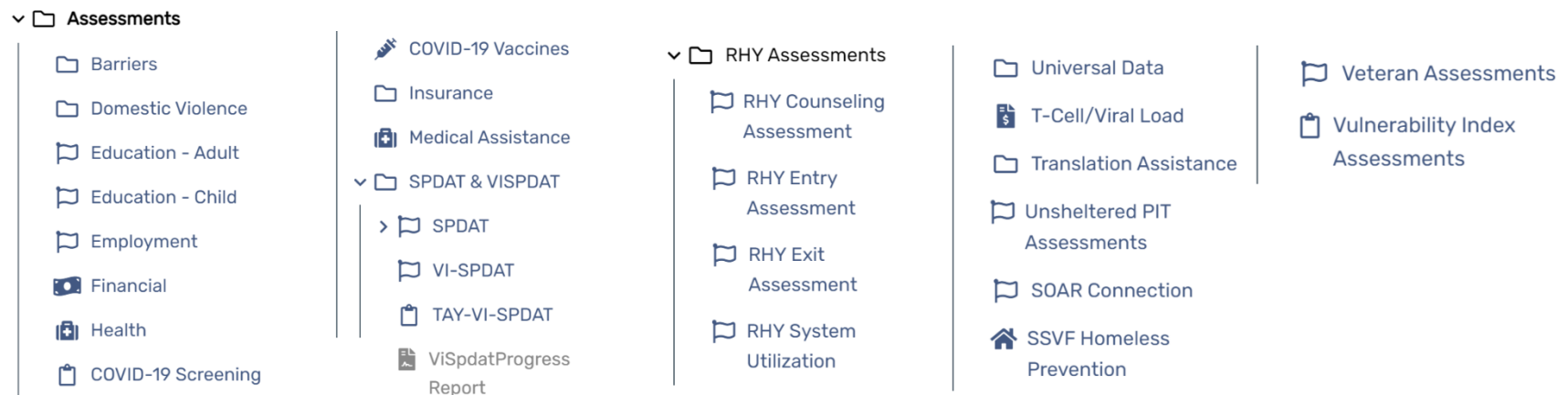


## Assessments: Folder

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*



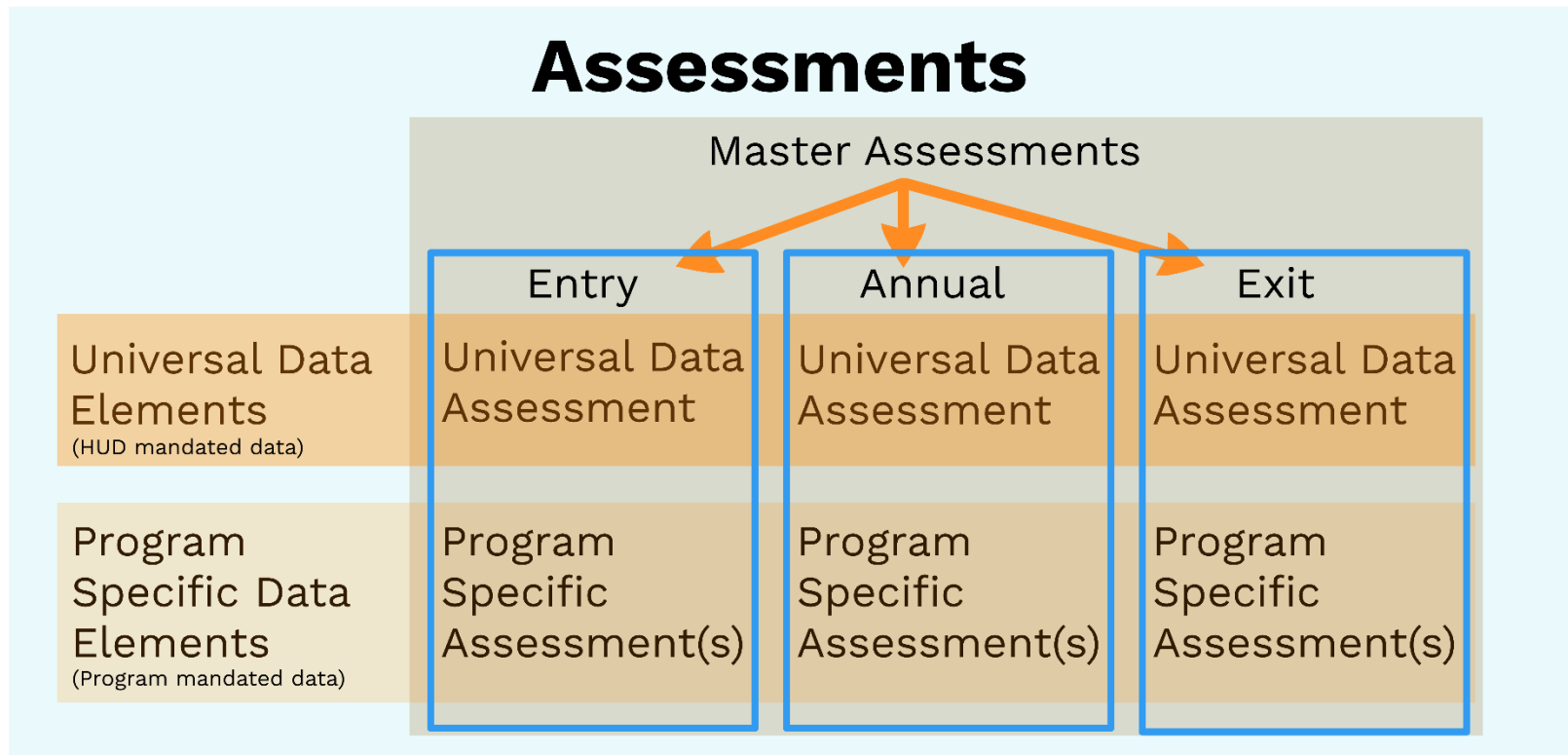
Assessments

## 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



*Assessments in ClientTrack*

## **Steps to Navigating to Client Assessments Folder**

**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”.*

The screenshot displays the 'Client Master Assessments' workspace. On the left, a dark blue sidebar contains a search bar and a list of navigation options: Find Client, HMIS Intake, Client Files, Document Check, Client Dashboard, Edit Client, Case Notes, **Assessments** (highlighted with a blue arrow), Referrals, Services, and Enrollments. The main area shows the client profile for 'Lebron James' (ID 624, DOB 4/4/1994, phone 904-555-8458). Below the profile, the 'Master Assessments' section displays a table with 33 results found. The table has columns for Date, Program, and Type. A blue arrow points from the 'Assessments' folder in the sidebar to the table.

| Date       | Program                                   | Type  |
|------------|---|-------|
| 07/15/2024 | CoC FL-510 Street Outreach                | Entry |
| 06/26/2024 | ESG - Emergency Rental Assistance Program | Entry |
| 06/05/2024 | HUD VASH SSVF P2 RRH Referrals            | Exit  |
| 04/16/2024 | DVI - Block by Block                      | Entry |
| 04/11/2024 | FL - 510 Homeless Prevention              | Entry |
| 03/22/2024 | CoC FL-510 Coordinated Entry              | Entry |

*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”.

The screenshot shows the ClientTrack interface. On the left is a dark blue sidebar with a search icon and a list of menu items: Find Client, HMIS Intake, Client Files, Document Check, Client Dashboard, Edit Client, Case Notes, **Assessments** (highlighted with a red arrow), Referrals, Services, and Enrollments. The main content area at the top shows the client profile for Lebron James (ID 624, DOB 4/4/1994, phone 904-555-8458). Below the profile is a section titled 'Master Assessments' with a light blue background. It indicates '33 results found.' and contains a table with columns for Date, Program, and Type. A red arrow points from the 'Assessments' menu item to this section.

| Date       | Program                                   | Type  |
|------------|---|-------|
| 07/15/2024 | CoC FL-510 Street Outreach                | Entry |
| 06/26/2024 | ESG - Emergency Rental Assistance Program | Entry |
| 06/05/2024 | HUD VASH SSVF P2 RRH Referrals            | Exit  |
| 04/16/2024 | DVI - Block by Block                      | Entry |
| 04/11/2024 | FL - 510 Homeless Prevention              | Entry |
| 03/22/2024 | CoC FL-510 Coordinated Entry              | Entry |

*Client Assessments Folder*

Viewing Master Assessments for Particular Enrollments

## **Steps to View Master Assessments for Particular Enrollments (Entry and Exit\*)**

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.

**Client Dashboard**

**Enrollments**

**Action Button**

**Review Entry Assements**

**Client Information:** Lebron James, 624, 4/4/1994, 904-555-8458

**Enrollments Section:** All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a cli or perform annual assessment updates.

25 results found.

| Enrollment Description          | Case Members | Project Start Date | Housing Move-In Date | Exit Date | Exit Destination |
|---------------------------------|--------------|--------------------|----------------------|-----------|------------------|
| CoC FL-510 Street Outreach      | 1            | 07/15/2024         |                      |           |                  |
| DCF - CV ESG OUTREACH 2020-2021 | 1            | 01/30/2023         |                      |           |                  |
| New Dawn Outreach               | 1            | 01/26/2023         |                      |           |                  |

**Dropdown Menu Options:**

- Edit Enrollment Workflow
- Add Family Member
- View Case Members
- Update/Annual Assessment
- Link Assessments
- Associated Assessments
- Exit the Enrollment
- Review Entry Assessments**
- Review Case Notes

*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

The screenshot displays the 'Assessment Status' interface. On the left, under 'Details', the assessment date is July 15, 2024, the location is CoC FL-510 Street Outreach, the entry type is Entry, and the assessor is Benjamin Robertson. The main section, 'Progress', shows a list of assessment categories: HMIS Universal Data (marked 'Complete'), Homeless Prevention, Translation Assistance, HMIS Barriers, Domestic Violence, Financial, Employment, Adult Education, Child Education, and Health. A blue arrow points from a text box to the 'Financial' category. Another blue arrow points from the 'Complete' status of 'HMIS Universal Data' to a text box. A third blue arrow points from the 'Edit Assessment' button in the top right to another text box.

Details

July 15, 2024  
COC FL-510 Street Outreach  
Entry  
Benjamin Robertson

Progress 1 of 10

|                        |          |
|------------------------|----------|
| HMIS Universal Data    | Complete |
| Homeless Prevention    |          |
| Translation Assistance |          |
| HMIS Barriers          |          |
| Domestic Violence      |          |
| Financial              |          |
| Employment             |          |
| Adult Education        |          |
| Child Education        |          |
| Health                 |          |

Edit Assessment

Any assessment is able to be completed by clicking on the containing box

Edit "Master" Assessment

If an assessment is Complete then it can be edited by clicking anywhere in the container box

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  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”.*



Lebron James  
624 4/4/1994 --  
904-555-8458 --



## Master Assessments



Below is a list of Master Assessments that have been created for this client. Please use the HMIS workflows to add or edit assessments.

33 results found.

|     | Date       | Program                        | Type  | Assessor                   | Comments | AssessID |
|-----|------------|--------------------------------|-------|----------------------------|----------|----------|
| *** | 08/01/2024 | CRM - Emergency Services       | Entry | Michael Holbrook           |          | 2614     |
| *** | 07/15/2024 | CoC FL-510 Street Outreach     | Entry | Benjamin Robertson         |          | 2603     |
|     |            | Assistance Program             | Entry | Ryan Monique Rolle-Jackson |          | 2528     |
| *** | 06/05/2024 | HUD VASH SSVF P2 RRH Referrals | Exit  | Benjamin Robertson         |          | 2507     |

View Related Assessments

View Related Enrollment or Applications

[View Related Assessments](#)



Lebron James  
624

4/4/1994  
904-555-8458

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## Assessment Status

[Edit Assessment](#)

### Details

📅 August 01, 2024  
📁 CRM - Emergency Services  
👤 Entry  
👤 Michael Holbrook

### Progress

4 of 10

|                        |          |
|------------------------|----------|
| HMIS Universal Data    | Complete |
| Homeless Prevention    |          |
| Translation Assistance | Complete |
| HMIS Barriers          | Complete |
| Domestic Violence      | Complete |
| Financial              |          |
| Employment             |          |
| Adult Education        |          |
| Child Education        |          |
| Health                 |          |

*Related Assessments*

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

|                        |          |
|------------------------|----------|
| HMIS Universal Data    | Complete |
| Homeless Prevention    |          |
| Translation Assistance | Complete |



HP Targeting Criteria

Answer the SSVF HP Targeting Criteria to see the client's HP applicant total points.

SSVF Homeless Prevention Assessment

Assessment Date: \* 06/26/2024

Assessment Active

Is Homelessness Prevention targeting screener required? \*

☐ Yes  
☐ No

Click to Open a Related Assessment