Annual Assessments

"Annual Assessment(s)" is a "Master Assessment"* that is required for clients who have been enrolled in a Coordinated Entry** program every 365 days or longer. Annual assessments are performed +/- 30 days of anniversary of the client's project entry date. For more information on Annual Assessments for program specific requirements, reach out to a supervisor or to hmis@changinghomelessness.org.

** For instructions on how to view a list of "Master Assessments", see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/* View List of Client's Master Assessments

*** For information regarding online resources, as well as where to find specific Federal HUD programs, see* Introduction/Online Resources in *the* "HMIS Basic User 2025 Manual".

Initiating Annual Assessments via the Enrollments Folder

This is method 1* of 2 on initiating Annual Assessments**.

** For information and instructions on how to initiate an Annual Assessment via the Current Enrollment w/Most Recent Assessment subfolder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Annual Assessments/*Initiating Annual Assessments via the Current Enrollment w/Most Recent Assessment Subfolder

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

Steps to Initiate Annual Assessments via the Enrollments 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".

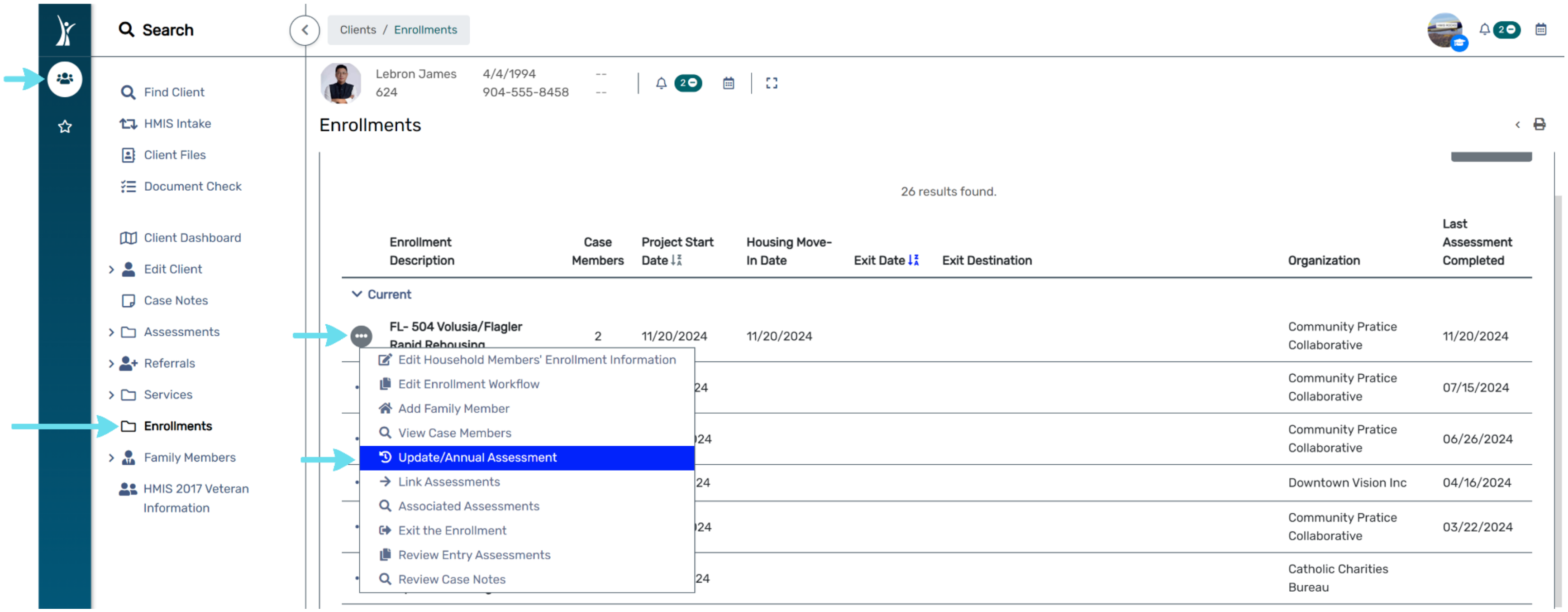
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* "HMIS Basic User 2025 Manual".

Step 2: Select the "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".

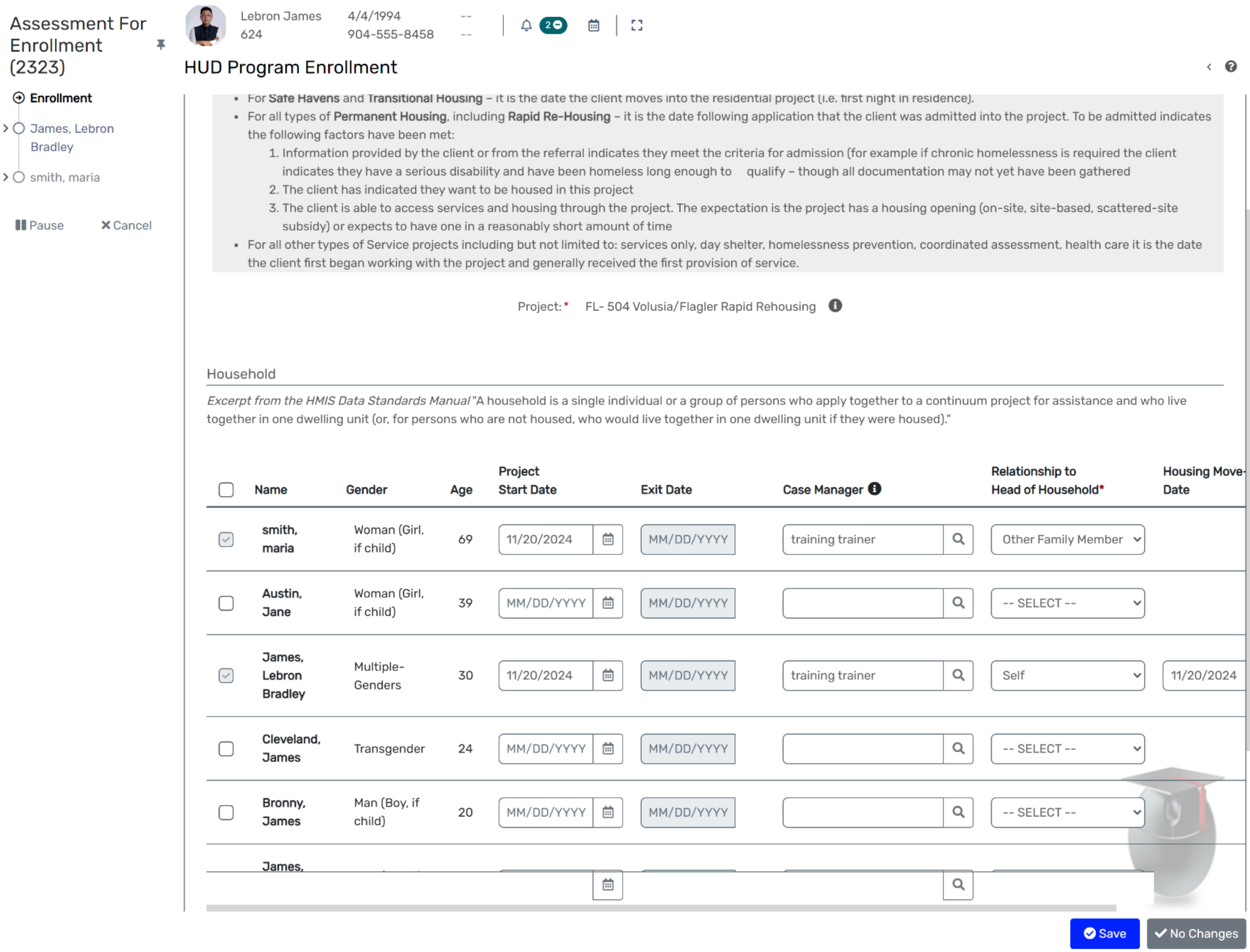
Step 3: Click the action button*. Click "Update/Annual Assessment". ClientTrack will navigate to the "HUD Program Enrollment" workflow step in the "Assessment For Enrollment" workspace container.

** 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".



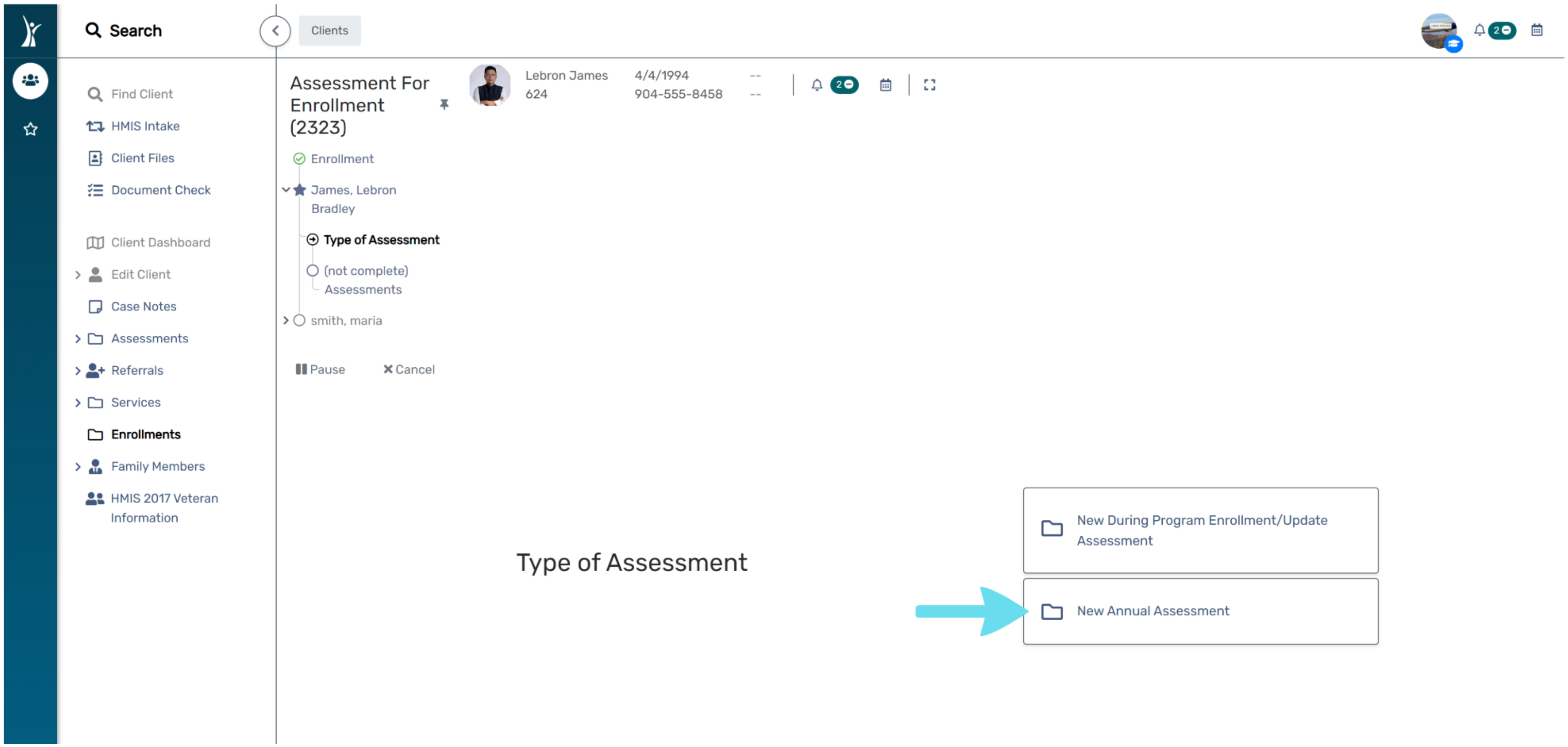
Annual Assessment via Enrollments Folder

Step 4: Verify the household enrollment members. Click "No Changes" if no enrollment changes were made. If any information is updated, click the "Save" button. After clicking "No Changes" or "Save", ClientTrack will navigate to the "Type of Assessment" workflow step in the "Assessment For Enrollment" workspace container.



Annual Assessment – HUD Program Enrollment

Step 5: Click "New Annual Assessment". ClientTrack will navigate to the "Universal Data Assessment" workflow step in the "Assessment For Enrollment" workspace container.



Type of Assessment Annual Assessment Workflow Step

Step 6: Complete the assessment as applicable per the program's requirements.

Initiating Annual Assessments via the Current Enrollment w/Most Recent Assessment Subfolder

This is method 2* of 2 on initiating Annual Assessments**.

** For information and instructions on how to initiate an Annual Assessment via the Current Enrollment w/Most Recent Assessment subfolder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Annual Assessments/*Initiating Annual Assessments via the Enrollments Folder

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

Steps to Initiate Annual Assessments via the Current Enrollment w/Most Recent Assessment subfolder

Step 1: Navigate to the Home Workspace*.

** 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 “My ClientTrack” secondary sidebar* menu option. A dropdown menu will appear under the “My ClientTrack” 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”.

Step 3: Select the “Current Enrollments” secondary sidebar menu option. A dropdown menu will appear under the “Current Enrollments” subfolder.

Step 4: Select the “Current Enrollments w/ Most Recent Assessment” secondary sidebar menu option. ClientTrack will navigate to the “Current Enrollments w/ Most Recent Assessment” workspace container.

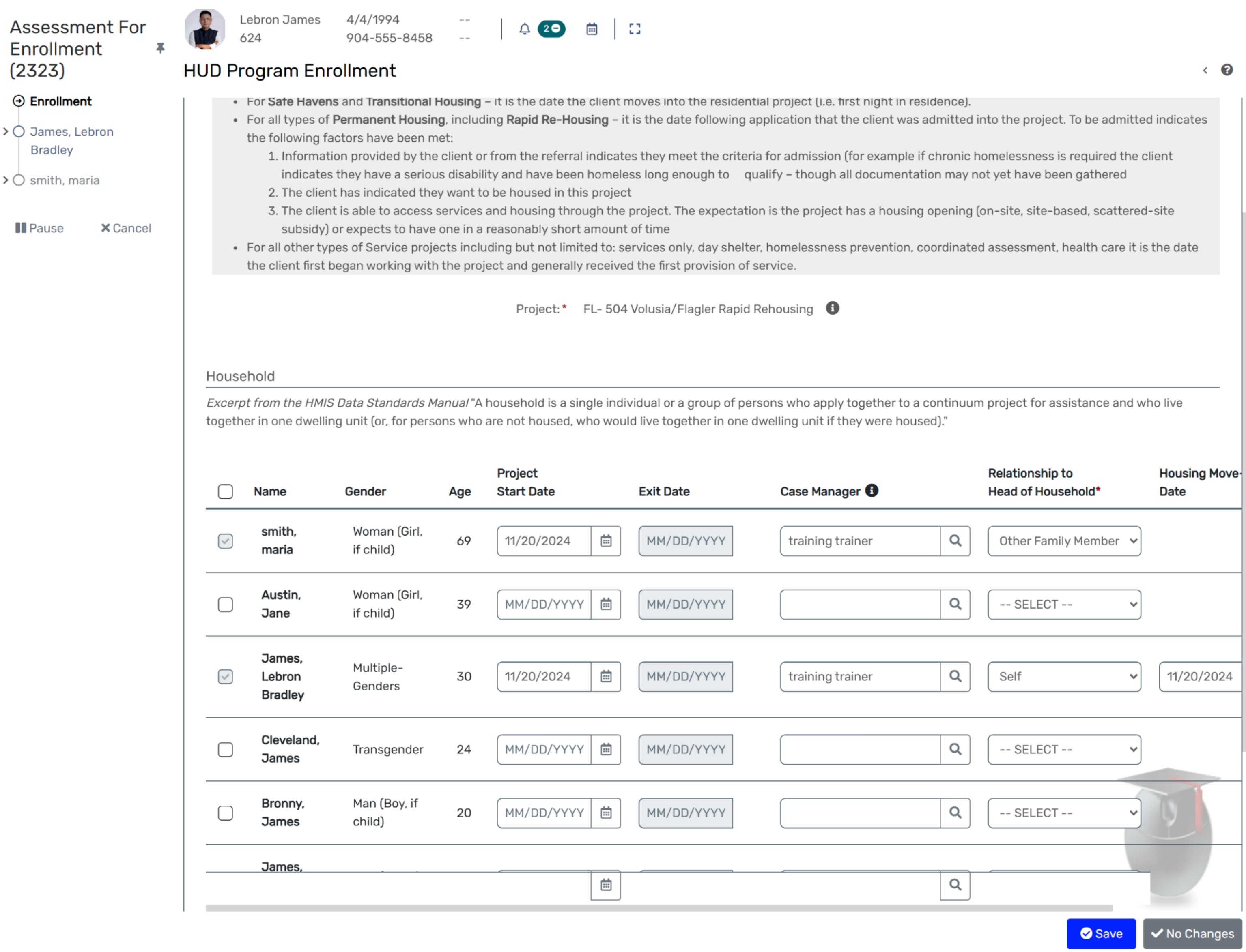
Step 5: Navigate to the applicable client(s) by scrolling or using the search criteria*.

** For information on using the Current Enrollment w/Most Recent Assessment Subfolder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/My ClientTrack: Folder/Current Enrollments: Subfolder/*Current Enrollments w/ Most Recent Assessment: Subfolder.

Step 6: Select the “Perform Annual Assessment” copy icon. * ClientTrack will navigate to the “HUD Program Enrollment” workflow step in the “Assessment For Enrollment” workspace container.

** 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”.

Step 7: Verify the household enrollment members. Click “No Changes” if no enrollment changes were made. If any information is updated, click the “Save” button. After clicking “No Changes” or “Save”, ClientTrack will navigate to the “Type of Assessment” workflow step in the “Assessment For Enrollment” workspace container.



Assessment For Enrollment (2323)

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

HUD Program Enrollment

- Enrollment
- James, Lebron Bradley
- smith, maria

Pause ✕Cancel

- For **Safe Havens** and **Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
- For all types of **Permanent Housing**, including **Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
  1. Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered
  2. The client has indicated they want to be housed in this project
  3. The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time
- For all other types of Service projects including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project:* FL- 504 Volusia/Flagler Rapid Rehousing

Household

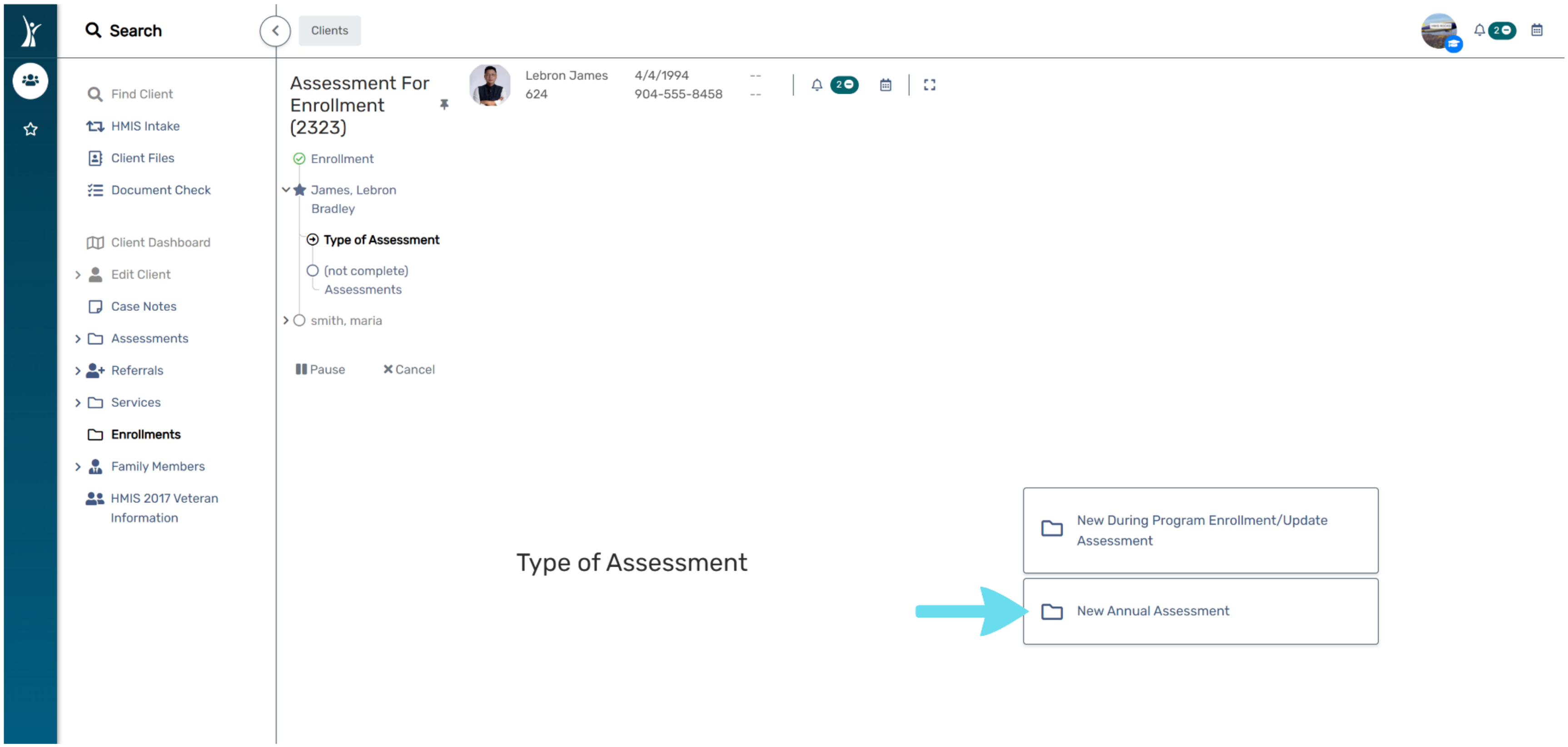
Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*	Housing Move-Date
☑	smith, maria	Woman (Girl, if child)	69	11/20/2024	MM/DD/YYYY	training trainer	Other Family Member	
☐	Austin, Jane	Woman (Girl, if child)	39	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
☑	James, Lebron Bradley	Multiple-Genders	30	11/20/2024	MM/DD/YYYY	training trainer	Self	11/20/2024
☐	Cleveland, James	Transgender	24	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
☐	Bronny, James	Man (Boy, if child)	20	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
	James,							

Save ✓No Changes

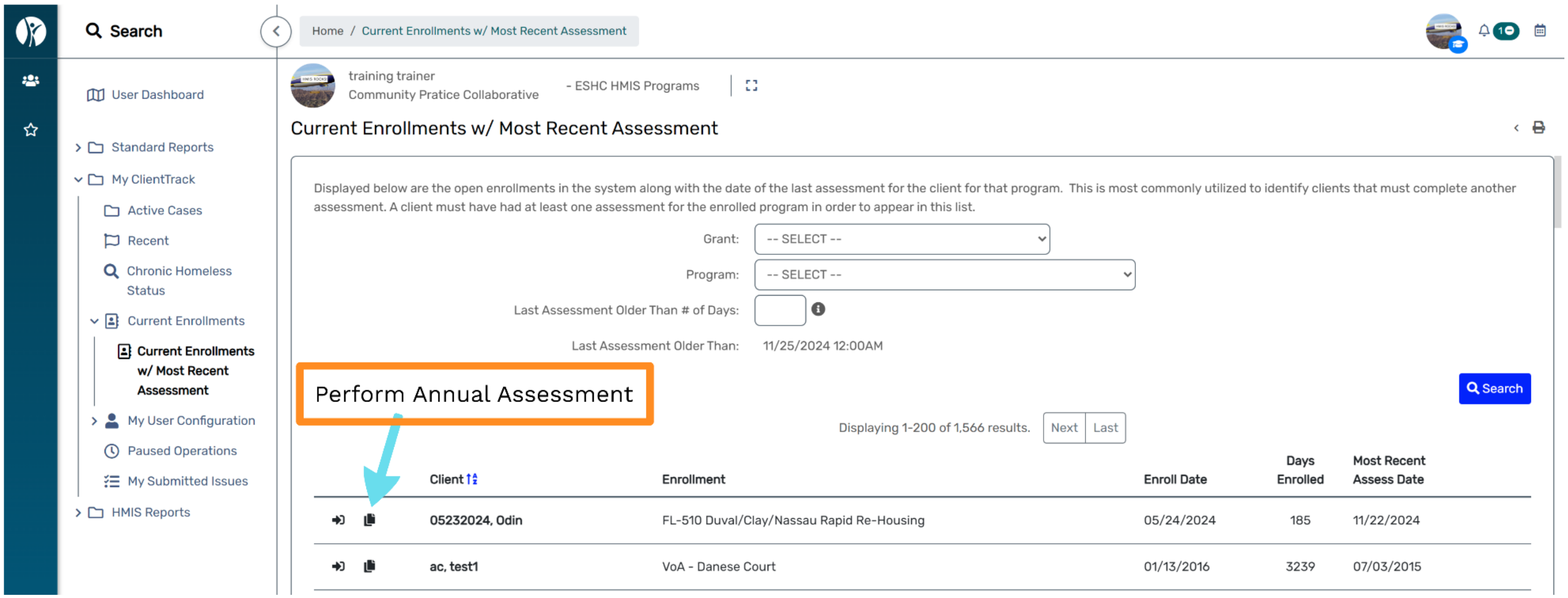
Annual Assessment – HUD Program Enrollment

Step 8: Click “New Annual Assessment”. ClientTrack will navigate to the “Universal Data Assessment” workflow step in the “Assessment For Enrollment” workspace container.



Type of Assessment Annual Assessment Workflow Step

Step 6: Complete the assessment as applicable per the program’s requirements. For more information on how to perform annual assessments, reach out to hmis@changinghomelessness.net.



Perform Annual Assessment Icon