

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”.*

Search

Find Client
HMIS Intake
Client Files
Document Check
Client Dashboard
Edit Client
Case Notes
Assessments
Referrals
Services
Enrollments
Family Members
HMIS 2017 Veteran Information

Clients / Enrollments

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

Enrollments

26 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
FL- 504 Volusia/Flagler Rapid Rehousing	2	11/20/2024	11/20/2024			Community Praticce Collaborative	11/20/2024
			24			Community Praticce Collaborative	07/15/2024
			24			Community Praticce Collaborative	06/26/2024
			24			Downtown Vision Inc	04/16/2024
			24			Community Praticce Collaborative	03/22/2024
			24			Catholic Charities Bureau	

Context Menu Options:

- Edit Household Members' Enrollment Information
- 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

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.

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:
 - 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
 - The client has indicated they want to be housed in this project
 - 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)."

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

Save No Changes

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

Assessment For Enrollment (2323)

Enrollment

James, Lebron Bradley

Type of Assessment

(not complete) Assessments

smith, maria

Pause Cancel

Type of Assessment

New During Program Enrollment/Update Assessment

New Annual Assessment

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

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<input checked="" type="checkbox"/>	smith, maria	Woman (Girl, if child)	69	11/20/2024	MM/DD/YYYY	training trainer	Other Family Member	
<input type="checkbox"/>	Austin, Jane	Woman (Girl, if child)	39	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
<input checked="" type="checkbox"/>	James, Lebron Bradley	Multiple-Genders	30	11/20/2024	MM/DD/YYYY	training trainer	Self	11/20/2024
<input type="checkbox"/>	Cleveland, James	Transgender	24	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
<input type="checkbox"/>	Bronny, James	Man (Boy, if child)	20	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
	James,							

Save No Changes

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

Assessment For Enrollment (2323)

Enrollment

James, Lebron Bradley

Type of Assessment

(not complete) Assessments

smith, maria

Pause Cancel

Type of Assessment

- New During Program Enrollment/Update Assessment
- New Annual Assessment

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.

Q Search

Home / Current Enrollments w/ Most Recent Assessment

training trainer
Community Practice Collaborative - ESHC HMIS Programs

User Dashboard

Standard Reports

My ClientTrack

- Active Cases
- Recent
- Chronic Homeless Status
- Current Enrollments
 - Current Enrollments w/ Most Recent Assessment**
- My User Configuration
- Paused Operations
- My Submitted Issues

HMIS Reports

Current Enrollments w/ Most Recent Assessment

Displayed below are the open enrollments in the system along with the date of the last assessment for the client for that program. This is most commonly utilized to identify clients that must complete another assessment. A client must have had at least one assessment for the enrolled program in order to appear in this list.

Grant: -- SELECT --

Program: -- SELECT --

Last Assessment Older Than # of Days:

Last Assessment Older Than: 11/25/2024 12:00AM

Perform Annual Assessment

Displaying 1-200 of 1,566 results.

Next Last

05232024, Odin

FL-510 Duval/Clay/Nassau Rapid Re-Housing

05/24/2024

185

11/22/2024

ac, test1

VoA - Danese Court

01/13/2016

3239

07/03/2015

Search

Perform Annual Assessment Icon