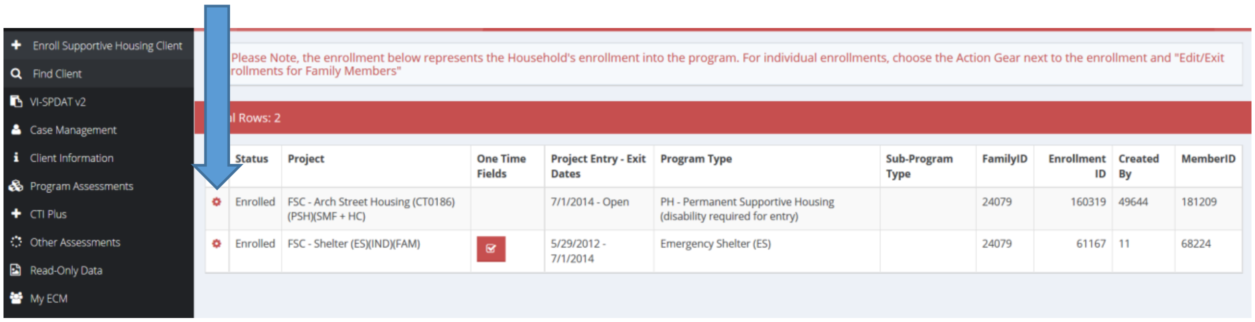
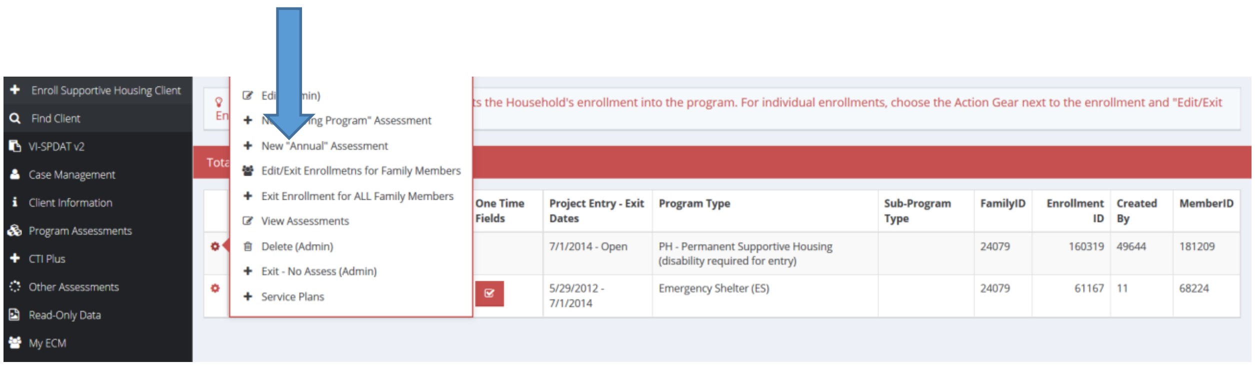
Annual Assessment Guide:

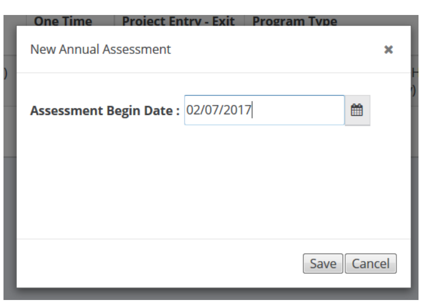
1. Set your provider and role in the upper right under your username
2. Use 'Find Client' in the left side menu – search by client ID when possible
3. Once you have found the client you need to update click on 'Case Management' in the left side menu
4. Find the enrollment associated with your program. Take note of the program enrollment start date.
5. Click the gear next to the enrollment where you want to create an annual assessment



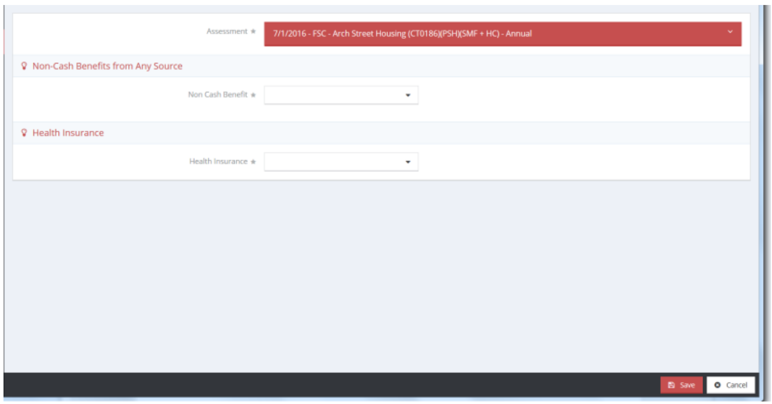
6. From the menu, select 'New Annual Assessment'



7. This will open your annual assessment start date window. The annual assessment date must be within 30 days before the enrollment start or after the enrollment start. Example, if the program enrollment start date is 7/1/2016. Then your annual assessment date must be between 6/1/2016 – 7/1/2016 or 7/1/2016 – 7/31/2016.



8. After you enter your annual assessment start date, as long as it falls within the allowable date range, HMIS will open the annual assessment work flow. If you put in a date that doesn't fall within the date range you will see an error message an you will be prompted to enter a correct date.
9. THIS IS IMPORTANT: after clicking save in the Assessment Begin Date window, BE PATIENT. This window will take 5 to 10 seconds to load. You will see the save button first and the rest of the screen will be blank. Make sure to WAIT until the page loads completely.

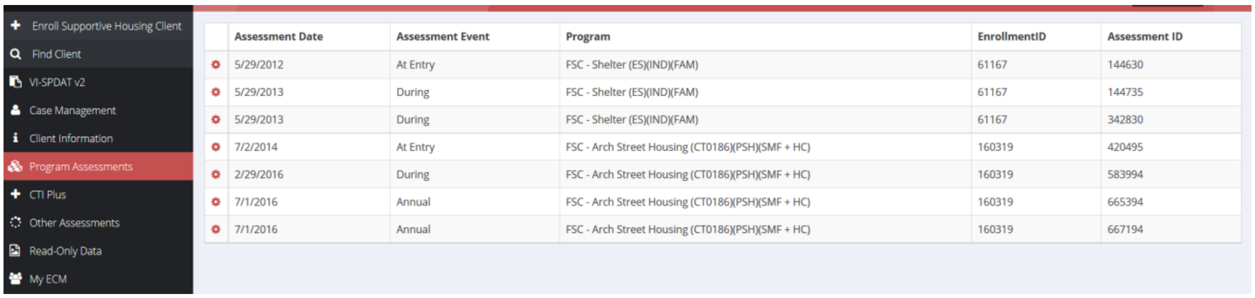


10. The annual assessment workflow will allow you to update the following:
    a. Non-Cash Benefits
    b. Health Insurance (yes/no)
    c. Health Insurance Type
    d. Income Spreadsheet

11. It is important to know what these values were in your entry assessment and most recent assessment to make sure you are making the correct updates and/or taking notice if a client had non-cash at entry or last assessment and for some reason they no longer have it. Same goes for Insurance and Income. You should be aware if you are inputting a change that is a reduction from the previous assessment.

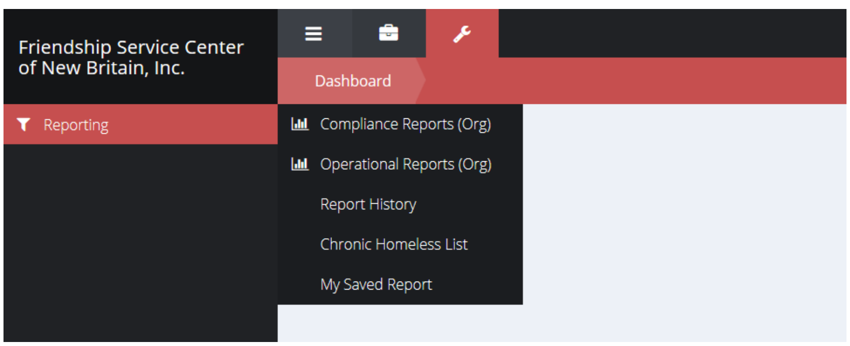
Viewing and Editing the Annual Assessment:

1. Click on ‘Program Assessments’ in the left side menu
2. Select HUD Program, HUD Financial or HUD Health Insurance – these three assessment get up dated with the annual assessment
3. Click on the gear next to the annual assessment; click edit to view or change data

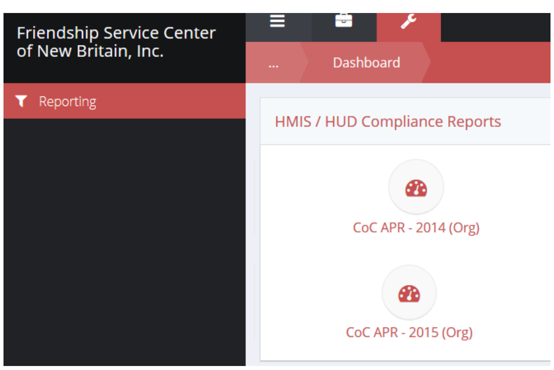


Evaluating the Annual Assessment on the CoC 2015 APR:

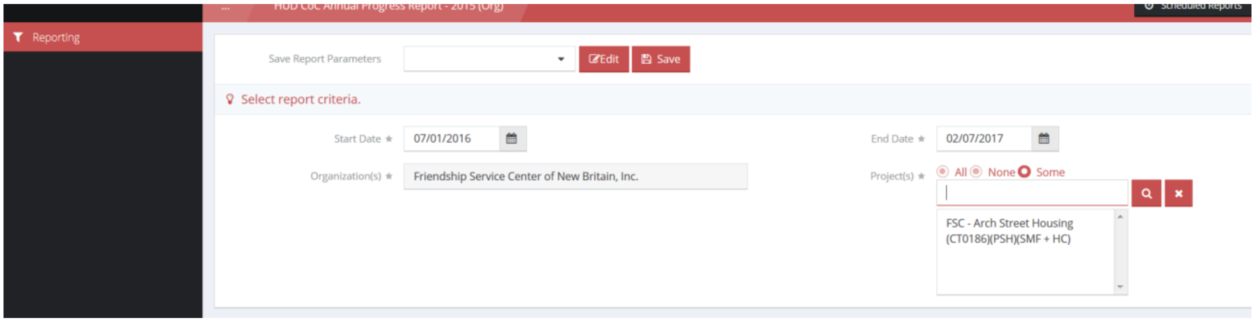
1. Click the wrench in the top menu to view reports
2. Click ‘reporting’ from the left side menu
3. Click on ‘compliance reports’



4. Click on CoC APR 2015



5. Complete the report set up form. Date range is vital. You must select a date range that is associated with your grant start and end date to make sure your APR is collecting all the necessary data to submit to HUD at the end of your contract year.



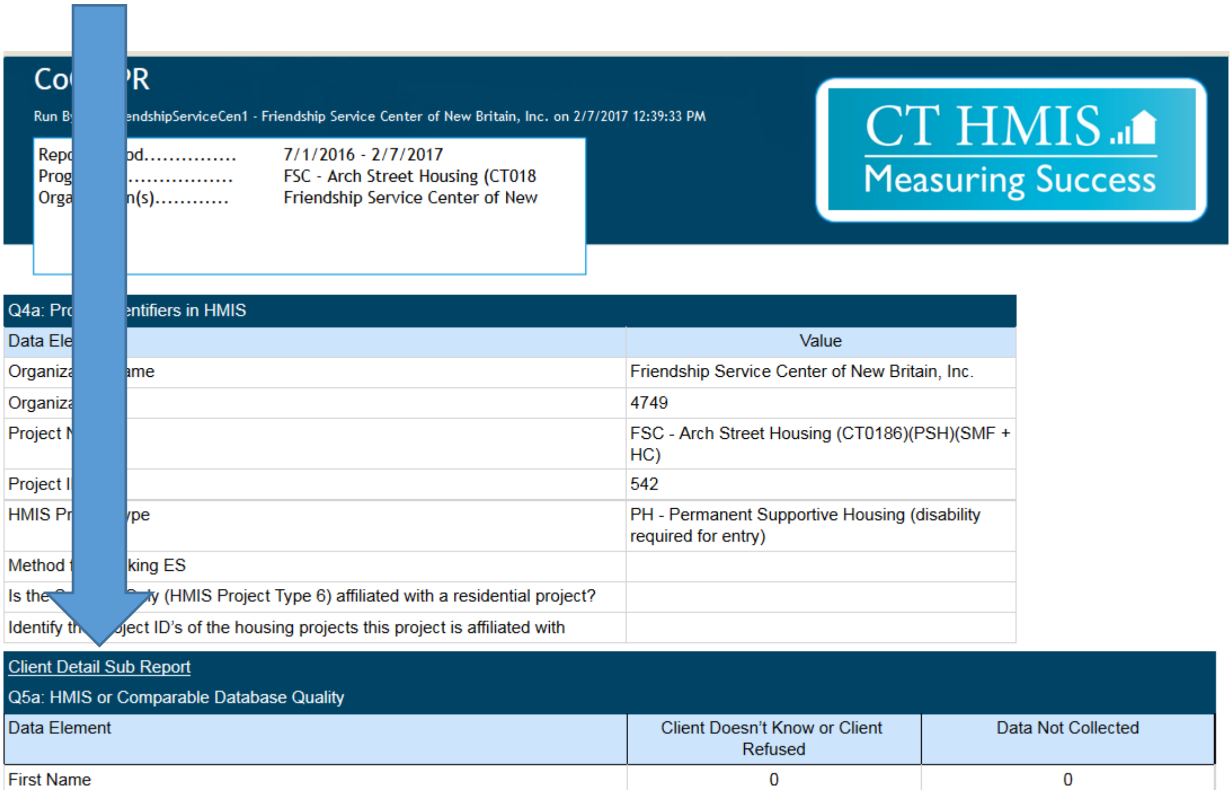
6. Click on Report in the bottom right of the screen once you have completed the form
7. The first table that involves the annual assessment is table Q16: Cash Income – Ranges

Q16: Cash Income - Ranges			
Label	Income at Entry	Income at Latest Annual Assessment for Stayers	Income at Exit for Leavers
No Income	3	1	0
1-150	1	2	0
151 - 250	0	0	0
251 - 500	3	1	0
501 - 1000	6	9	0
1001 - 1500	6	4	0
1501 - 2000	4	3	0
2001 +	0	0	0
Client Doesn't Know/Client Refused	0	0	0
Data Not Collected	0	0	0
Number of adult stayers not yet required to have an annual assessment		3	
Number of adult stayers without required annual assessment		0	
Total Adults	23	23	0

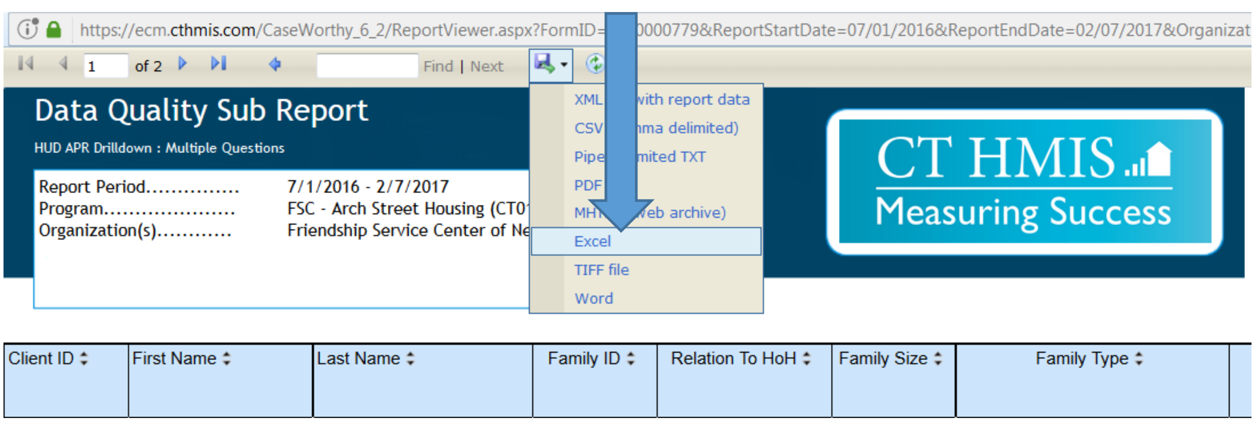
8. If your annual assessment data is not complete it will show in 2 places on this table.
    a. Data Not Collected
    b. Number of adult stayers without required annual assessment
9. The table will also tell you the number of adults who are not required yet.
10. If you have clients missing this assessment, you will need to review your client enrollment start dates to determine who needs an annual assessment. The only clients who would not need an assessment would be those who have not been in your program for a full year.
11. The same rules will apply to the other tables evaluating Annual Assessments.
    a. Income and Income Sources
    b. Non-Cash and Non-Cash Sources
    c. Health Insurance

If your APR indicates that you are missing Annual Assessments:

1. You will need to evaluate the detail report associated with the APR.
2. The detail report link is on the first page of the report:



3. From the sub report, click on the blue disk icon in the top tool bar and then you can export the report to excel



4. From the excel spread sheet you can see who needs an annual assessment by reviewing the 'Enrollment Begin Date' column