

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

Please Note, the enrollment below represents the Household's enrollment into the program. For individual enrollments, choose the Action Gear next to the enrollment and "Edit/Exit enrollments for Family Members"

Total Rows: 2

Status	Project	One Time Fields	Project Entry - Exit Dates	Program Type	Sub-Program Type	FamilyID	Enrollment ID	Created By	MemberID
Enrolled	FSC - Arch Street Housing (CT0186) (PSH)(SMF + HC)		7/1/2014 - Open	PH - Permanent Supportive Housing (disability required for entry)		24079	160319	49644	181209
Enrolled	FSC - Shelter (ES)(IND)(FAM)		5/29/2012 - 7/1/2014	Emergency Shelter (ES)		24079	61167	11	68224

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

Please Note, the enrollment below represents the Household's enrollment into the program. For individual enrollments, choose the Action Gear next to the enrollment and "Edit/Exit enrollments for Family Members"

Total Rows: 2

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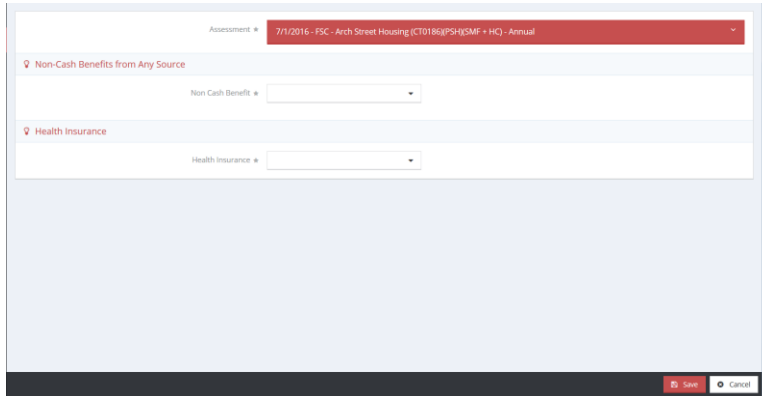
7. This will open your annual assessment start date window. The annual assessment date must be within 30 days before the enrollment start or after the enrollment start. Example, if the program enrollment start date is 7/1/2016. Then your annual assessment date must be between 6/1/2016 – 7/1/2016 or 7/1/2016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

New Annual Assessment

Assessment Begin Date: 02/07/2017

Save Cancel

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 and 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.



The screenshot shows a web-based assessment form. At the top, there is a header bar with the text "Assessment" and a dropdown menu showing "7/1/2016 - FSC - Arch Street Housing (CT0186)PSHySMF + HC - Annual". Below the header, there are two main sections: "Non-Cash Benefits from Any Source" and "Health Insurance". Each section contains a dropdown menu labeled "Non Cash Benefit" and "Health Insurance" respectively. At the bottom right of the form, there are two buttons: "Save" and "Cancel".

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.

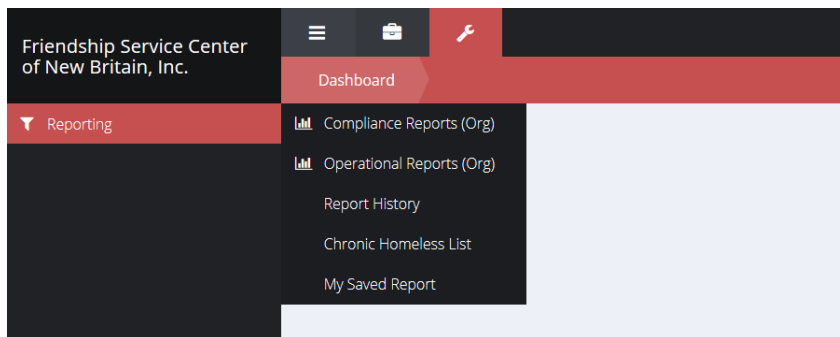
Viewing and Editing the Annual Assessment:

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

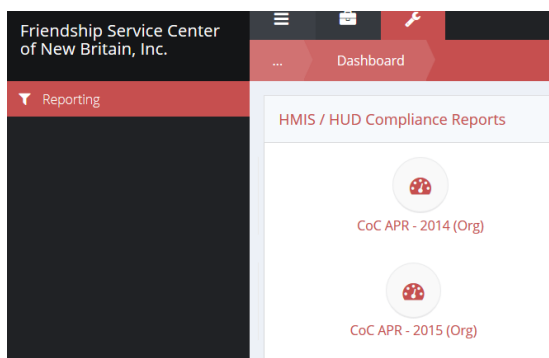
Assessment Date	Assessment Event	Program	EnrollmentID	Assessment ID
5/29/2012	At Entry	FSC - Shelter (ES)(IND)(FAM)	61167	144630
5/29/2013	During	FSC - Shelter (ES)(IND)(FAM)	61167	144735
5/29/2013	During	FSC - Shelter (ES)(IND)(FAM)	61167	342830
7/2/2014	At Entry	FSC - Arch Street Housing (CT0186)(PSH)(SMF + HC)	160319	420495
2/29/2016	During	FSC - Arch Street Housing (CT0186)(PSH)(SMF + HC)	160319	583994
7/1/2016	Annual	FSC - Arch Street Housing (CT0186)(PSH)(SMF + HC)	160319	665394
7/1/2016	Annual	FSC - Arch Street Housing (CT0186)(PSH)(SMF + HC)	160319	667194

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



- 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.

- Click on Report in the bottom right of the screen once you have completed the form
- 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

- If your annual assessment data is not complete it will show in 2 places on this table.
 - Data Not Collected
 - Number of adult stayers without required annual assessment
- The table will also tell you the number of adults who are not required yet.
- 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.
- The same rules will apply to the other tables evaluating Annual Assessments.
 - Income and Income Sources
 - Non-Cash and Non-Cash Sources
 - 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:

Run By: FriendshipServiceCen1 - Friendship Service Center of New Britain, Inc. on 2/7/2017 12:39:33 PM

Report Period: 7/1/2016 - 2/7/2017
 Program: FSC - Arch Street Housing (CT018)
 Organization(s): Friendship Service Center of New

CT HMIS
Measuring Success

Q4a: Project Identifiers in HMIS

Data Element	Value
Organization Name	Friendship Service Center of New Britain, Inc.
Organization ID	4749
Project Name	FSC - Arch Street Housing (CT0186)(PSH)(SMF + HC)
Project ID	542
HMIS Project Type	PH - Permanent Supportive Housing (disability required for entry)
Method of Counting ES	
Is the Community (HMIS Project Type 6) affiliated with a residential project?	
Identify the Project ID's of the housing projects this project is affiliated with	

[Client Detail Sub Report](#)

Q5a: HMIS or Comparable Database Quality

Data Element	Client Doesn't Know or Client Refused	Data Not Collected
First Name	0	0

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

https://ecm.cthmis.com/CaseWorthy_6_2/ReportViewer.aspx?FormID=0000779&ReportStartDate=07/01/2016&ReportEndDate=02/07/2017&Organizat

Data Quality Sub Report
HUD APR Drilldown : Multiple Questions

Report Period: 7/1/2016 - 2/7/2017
 Program: FSC - Arch Street Housing (CT018)
 Organization(s): Friendship Service Center of New

CT HMIS
Measuring Success

- XML (with report data)
- CSV (comma delimited)
- Pipe delimited TXT
- PDF
- MHTML (web archive)
- Excel**
- TIFF file
- Word

Client ID	First Name	Last Name	Family ID	Relation To HoH	Family Size	Family Type

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

