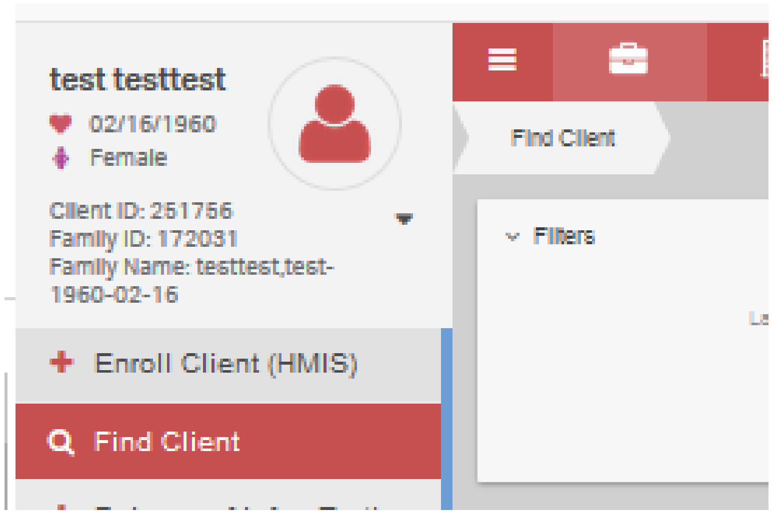
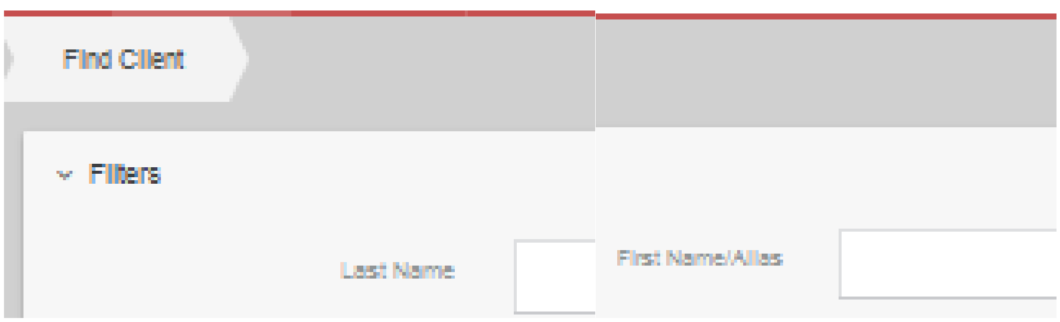
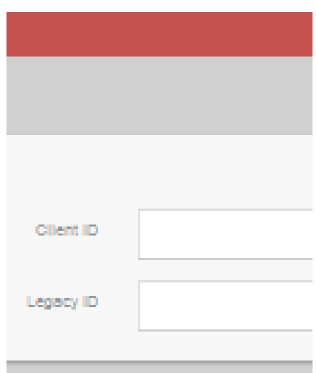
Annual Assessment Guide

Last Updated: October 2020

- Log in to HMIS with your User name and Role
- Use the 'Find Client' link on the left panel
    - Search by ID if available
    - Search by name if needed

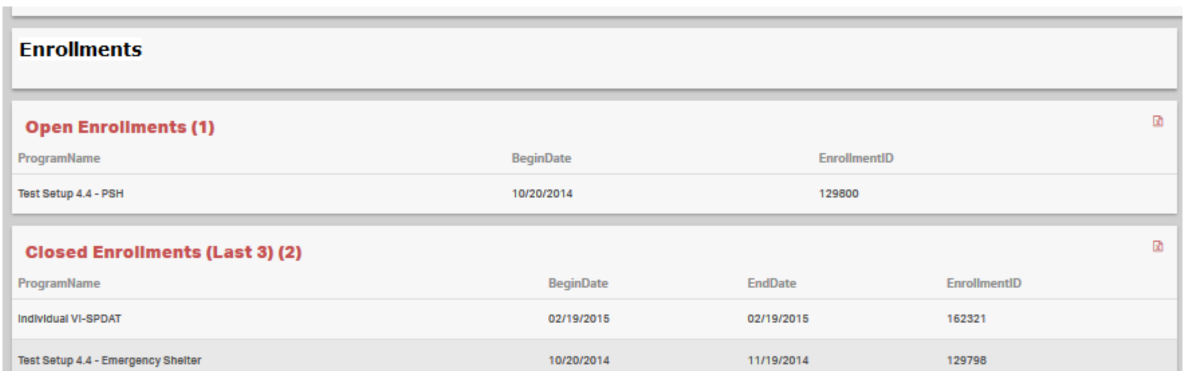






- The screens load slowly so watch for the processing bar in the lower right corner of the screen
  - When the bar disappears the screen is fully loaded

- Landing page shows the client enrollments



Enrollments

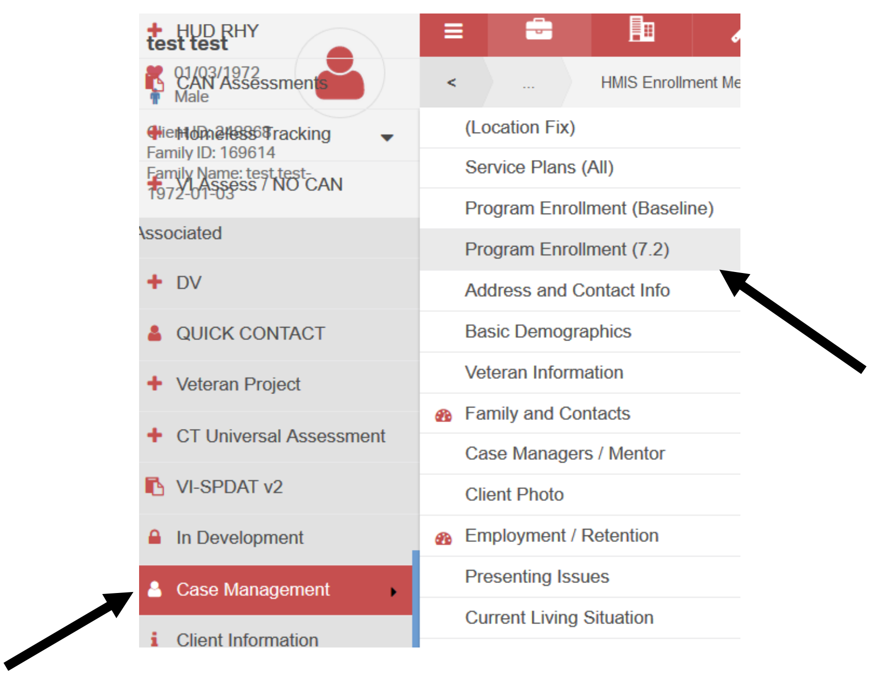
Open Enrollments (1)

ProgramName	BeginDate	EnrollmentID
Test Setup 4.4 - PSH	10/20/2014	129800

Closed Enrollments (Last 3) (2)

ProgramName	BeginDate	EndDate	EnrollmentID
Individual VI-SPDAT	02/19/2015	02/19/2015	162321
Test Setup 4.4 - Emergency Shelter	10/20/2014	11/19/2014	129798

- Once the client screen has loaded click on the Case Management link on the left panel
  - Click on Program Enrollment (7.2)

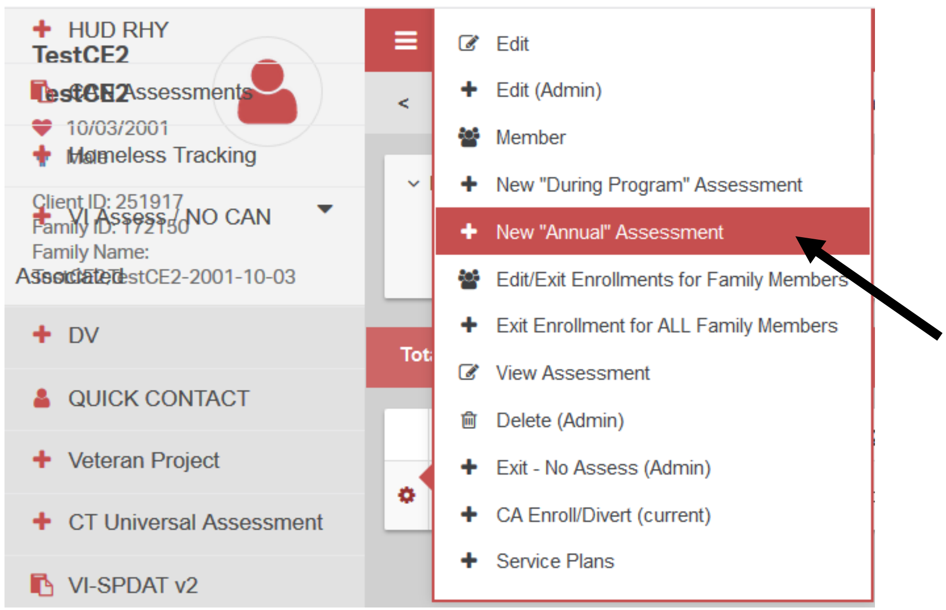


- Select the enrollment to update by clicking on the gear icon

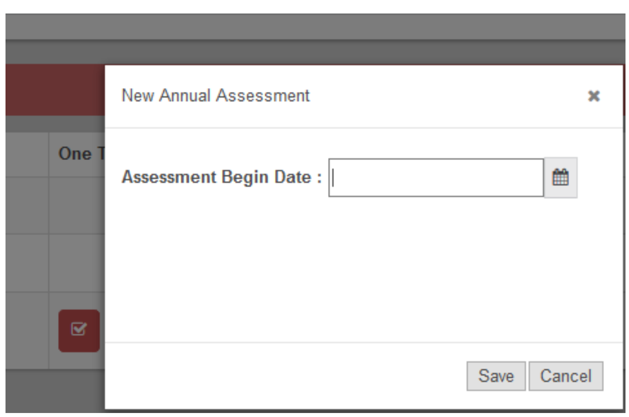
Total Rows: 3

	Status	Project | Assigned Case Mgr	Project Start- Exit Dates
⚙	Exited From Program	Individual VI-SPDAT |	2/19/2015 - 2/19/2015
⚙	Assessments Pending	Test Setup 4.4 - PSH |	10/20/2014 - Open
⚙	Enrolled In Program	Test Setup 4.4 - Emergency Shelter |	10/20/2014 - Open

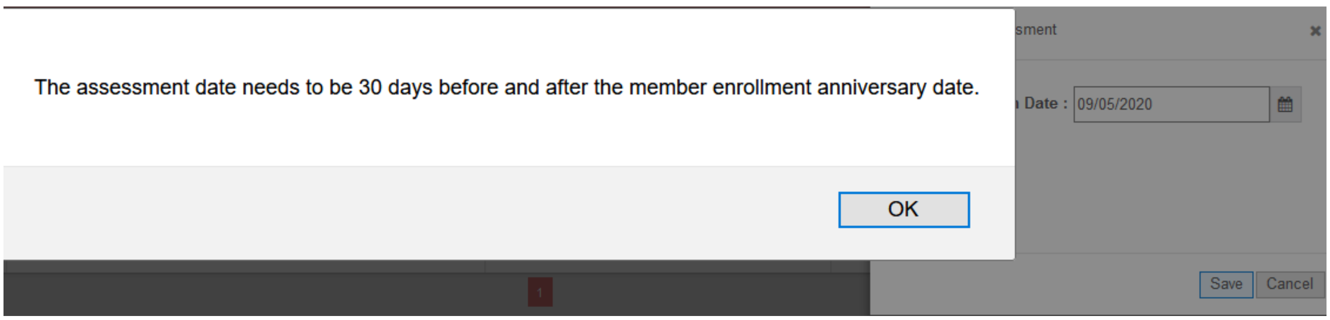
- Select New "Annual" Assessment



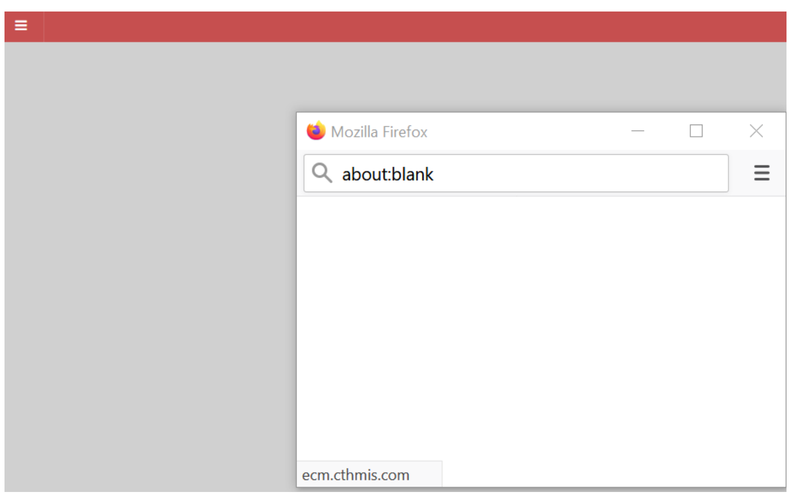
- You will be prompted to enter the Assessment Begin Date



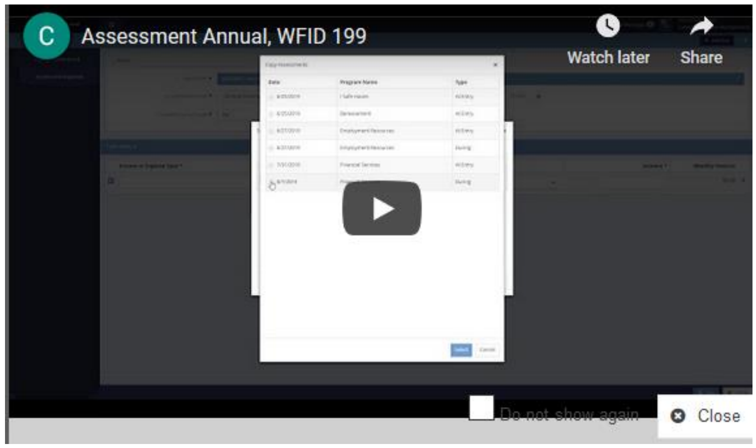
- The Assessment Begin Date month and date have to coincide with 30 days prior to or 30 days after the initial enrollment date
- **Example:**
    - Enrollment date is 10/20/2014
    - [09/20/2014 to 10/20/2014 date range = 30 days   10/20/2014 to 11/19/2014 date range = 30 days]
        - Assessment date must be between 09/20/current year and 11/19/current year
    - If 09/05/2020 entered for Assessment Begin Date will result in the error pop up
        - **'The assessment date needs to be 30 days before and after the member enrollment anniversary date'**



- Entering 10/01/2020 allows the assessment window to open
- It will take the window several seconds to load completely

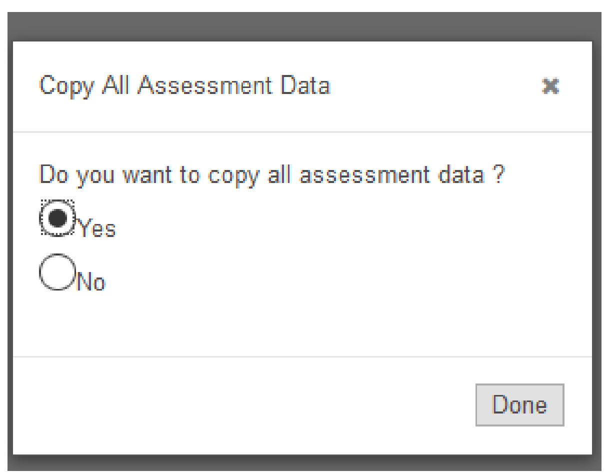


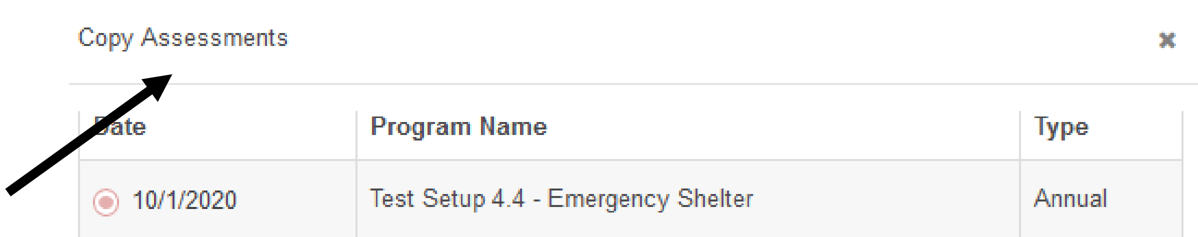
- Once the window opens an Assessment Annual, WFID 199 short video will pop up and provides information on family assessments if needed

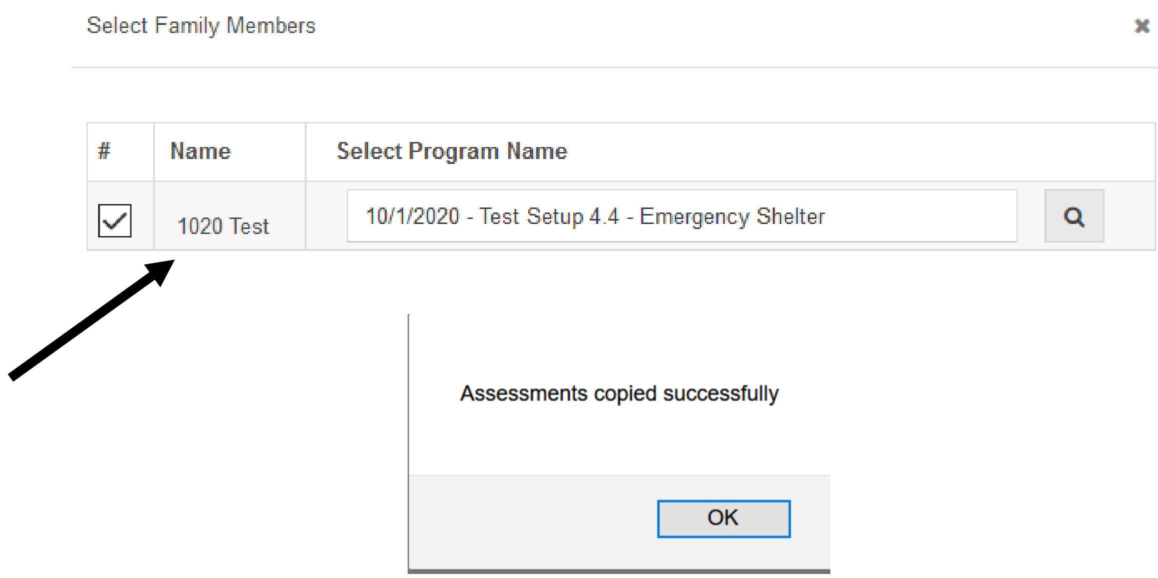


- When the video window is closed the Annual Assessment Workflow will open

- You may get a window asking if you want to copy the assessment data
- **It is not recommended to copy the assessment data so that all existing data can be reviewed for accuracy**
    - If appropriate click Yes and the assessment data will be copied
    - If you select No to copying the assessment data the workflow will continue
        - Either way you will be prompted to enter any necessary information through the remainder of the workflow

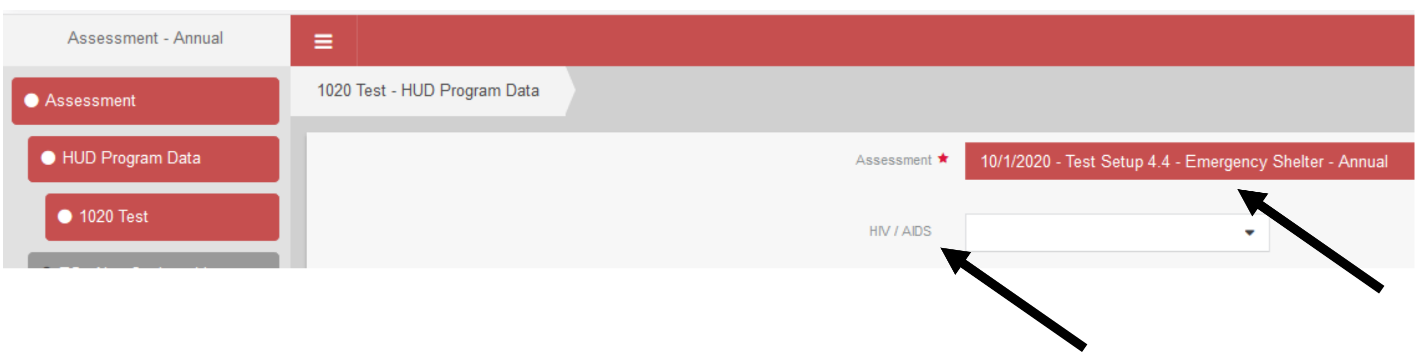




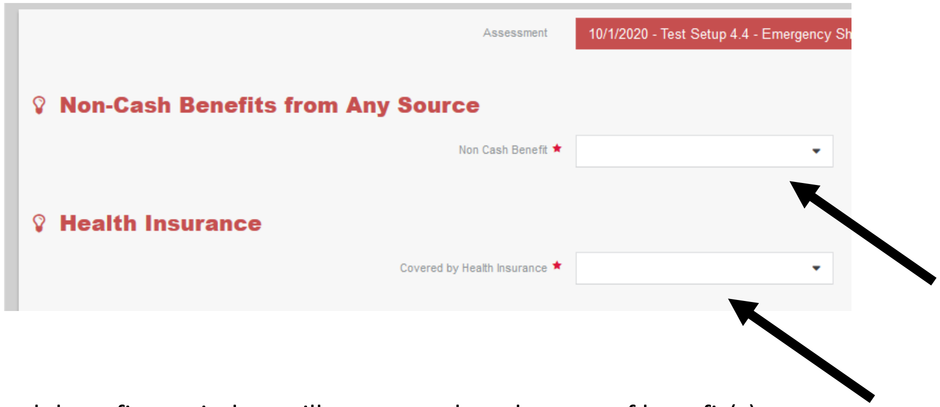


If selecting No to copying the assessment or if the option to copying the assessment is not offered:

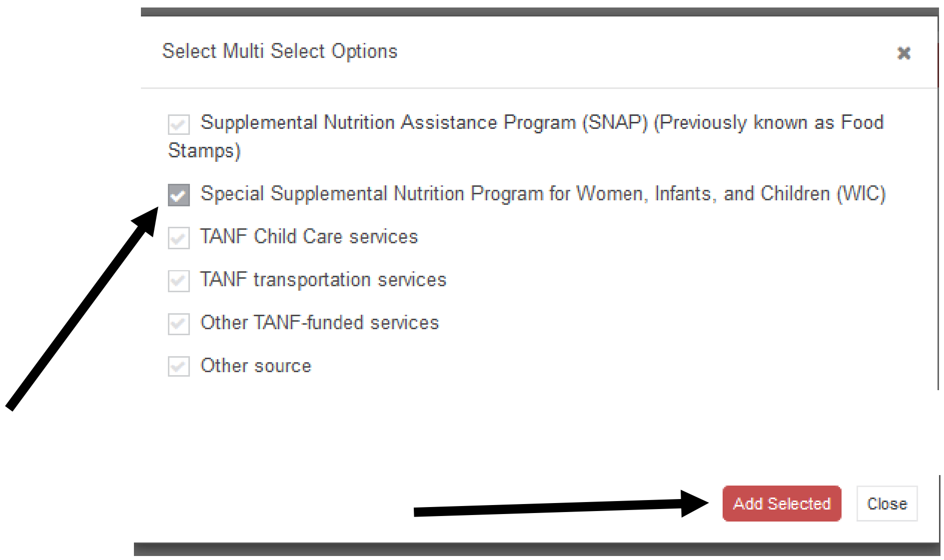
- The Program enrollment to be assessed is shown at the top of the screen
  - There is a drop down if you need to select a different enrollment to update
- The workflow progress is shown on the left panel
  - Update the HIV Status
  - Use the drop down to make any changes
    - Click on Save in the lower right corner



- The next sections to be updated are:
  - Non-cash benefits
  - Health Insurance
  - Income from any source
    - Check the existing values to be sure you are updating the correct values in the record



- If updating non-cash benefits a window will open to select the type of benefit(s)
  - Add Selected
    - Use the same process to update the Health Insurance
    - Click on Save in lower right corner to continue the workflow



- The next screen is the Income from Any Source
- Clicking Yes will open a drop down of types of income; Interval; and Amount
  - Check off the income source
  - Enter the Interval
  - Enter the amount
    - The system will automatically calculate the **Intervals per Month** and total **Monthly Amount**
      - Click on Save in lower right corner

Assessment * 10/1/2020 - Test

Income from Any Source * Yes

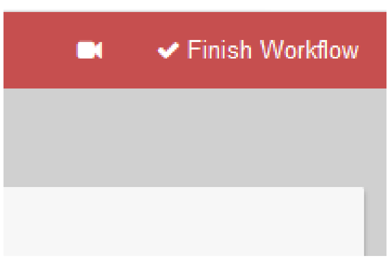
	Income Type *
☑	Unemployment Insurance
☑	Earned Income (i.e., employment income)
☑	Supplemental Security Income (SSI)

Interval *	Amount Per Interval *
	$0.00
Monthly	$800.00
Weekly	40.00
	$0.00

Intervals Per Month	Monthly Amount *
0.00	$0.00
1.000	$800.00
4.333	$173.32

- You will be prompted that the workflow is now complete

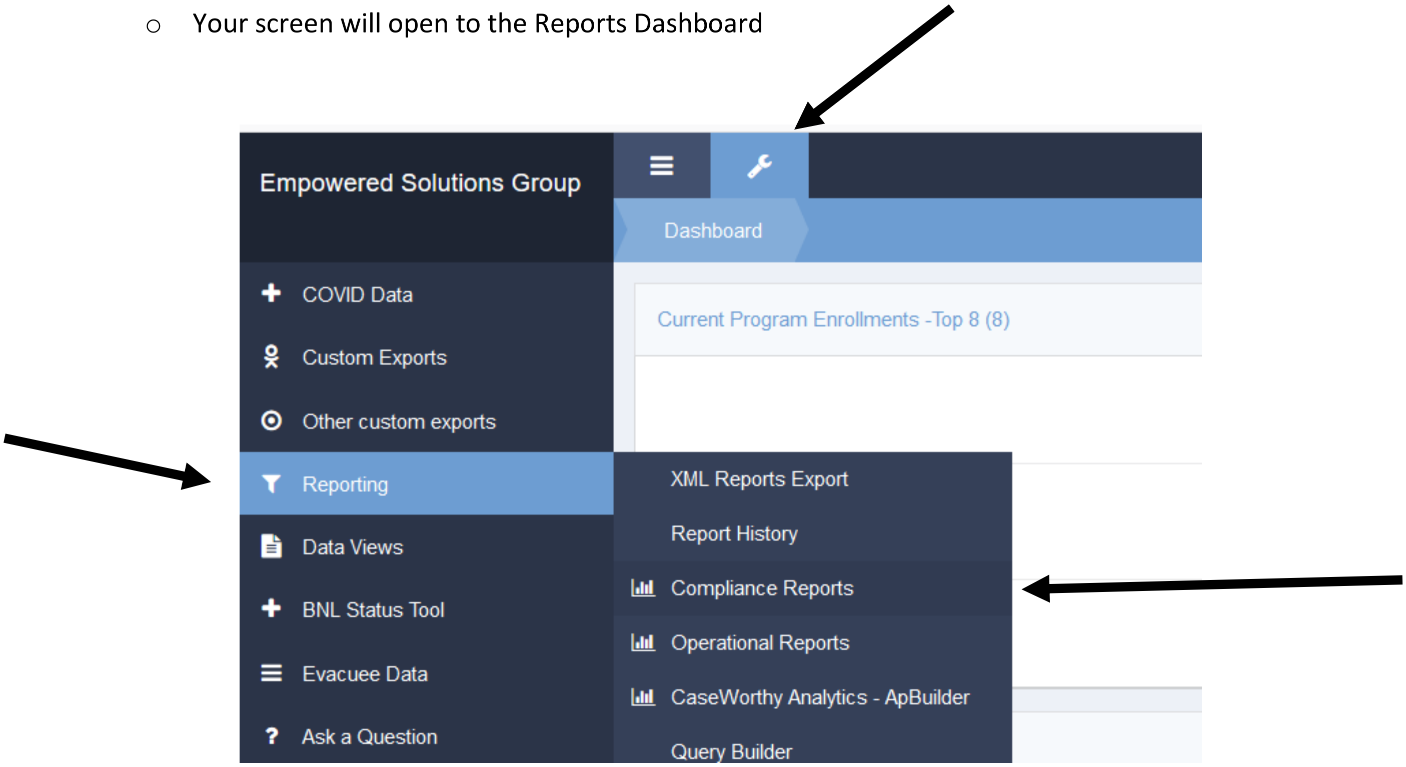
- Click on Finish Workflow in the top right corner of the screen
- Click Done in lower right corner of screen



To Evaluate the Annual Assessment in the APR

Login to HMIS with your User name and Role

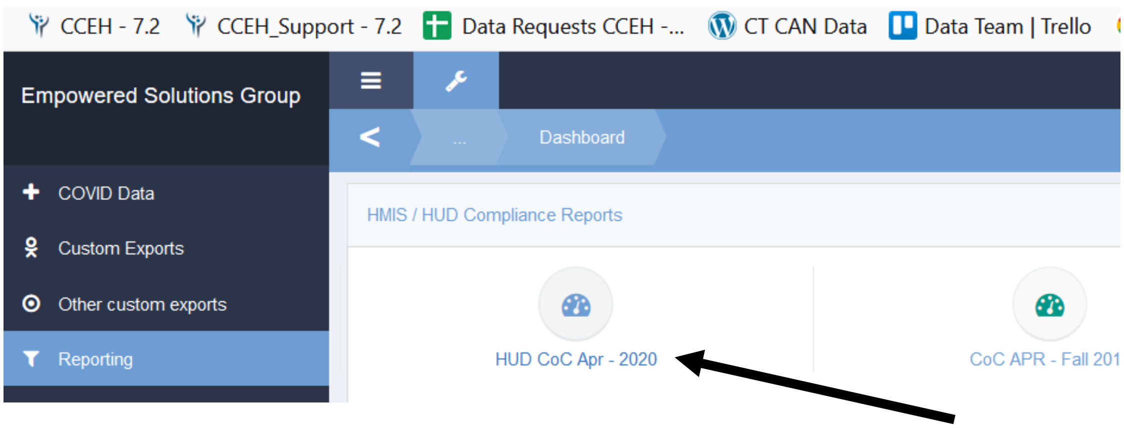
- Click on the **wrench icon** on the top left of the screen
- Click on **Reporting** on the left panel
- From the drop down menu click on **Compliance Reports**
    - Your screen will open to the Reports Dashboard



- There is a lag in HMIS so it may take a few seconds for the screens to load as you move through the report process

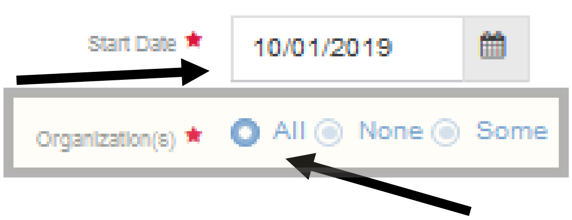
- You can see a blue or red **processing bar** in the lower right corner of the screen indicating that the screen is not yet fully loaded
    - The bar will disappear when the next screen is loaded

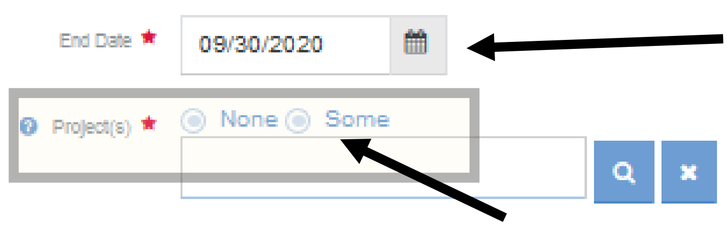
- Once the **Reports Dashboard** screen has loaded you'll see the icon for the **HUD CoC Apr - 2020 Report**



Enter Report Parameters

- Enter your **start and end dates**
  - End users should be sure to enter the desired date range for the specified reporting period
- The **Organization(s)** radio button can be left on **All**
- You can change the radio button to **Some** and enter the name(s) of specific Organizations
  - The process for entering Organization names is exactly the same as entering the Project(s) name(s)
  - For the APR Organization(s) is usually set to All
- You will have to add each **Project name** individually to the report
  - Set the Project(s) radio button to **Some**

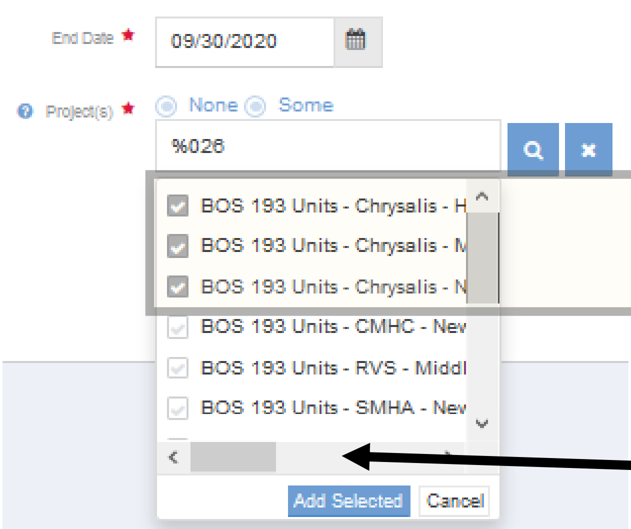


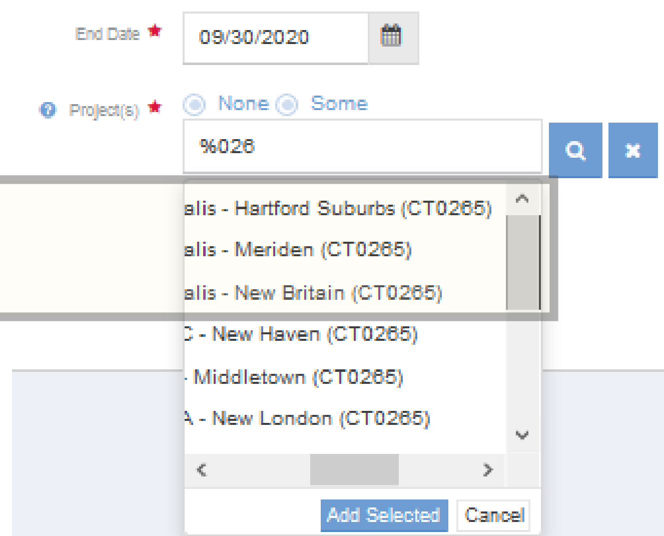


- Use a wildcard search to locate the Project name or number
  - Searching by number is more efficient
- The **wildcard symbol %** and can be used at the start, middle, or end of your text or number search
  - **%Chry** **or** **%Chrysalis** **or** **%0265**

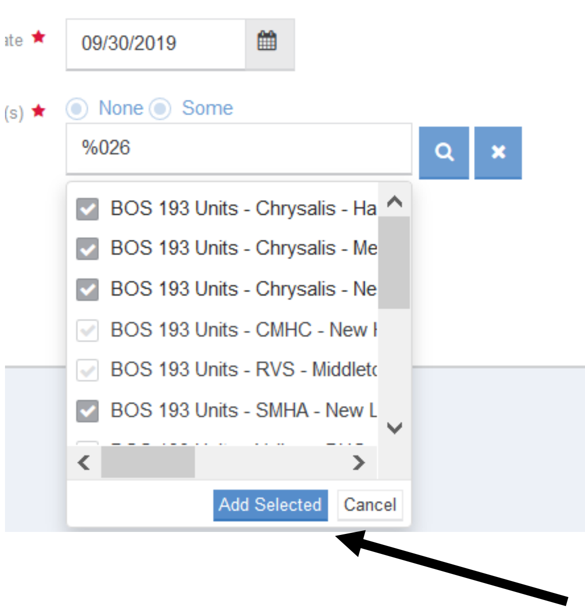
- The screen is very small and you will have to scroll back and forth to see the full Project name
    - The Project name starts on the left but you'll have to scroll to the right to see the rest of the name
    - Once you see the Project you need you can click on it no matter which side of the scroll bar you are on

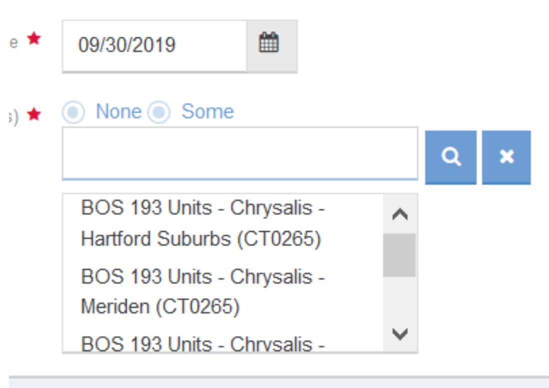
- Clicking on the Project name will add a check mark on the left

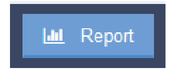




- Click on **Add Selected** to load the checked off Project names into the report
    - You can select the names all at once or a few at a time
- Review all of the Project names before you run the report
    - If you added a Project you do not need you can remove it by clicking on the name

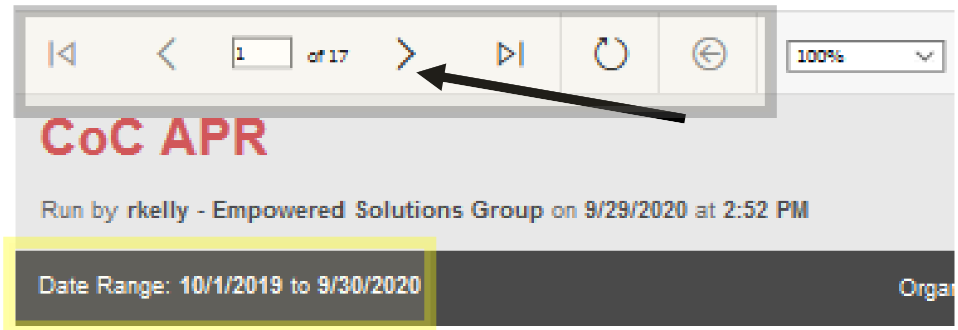




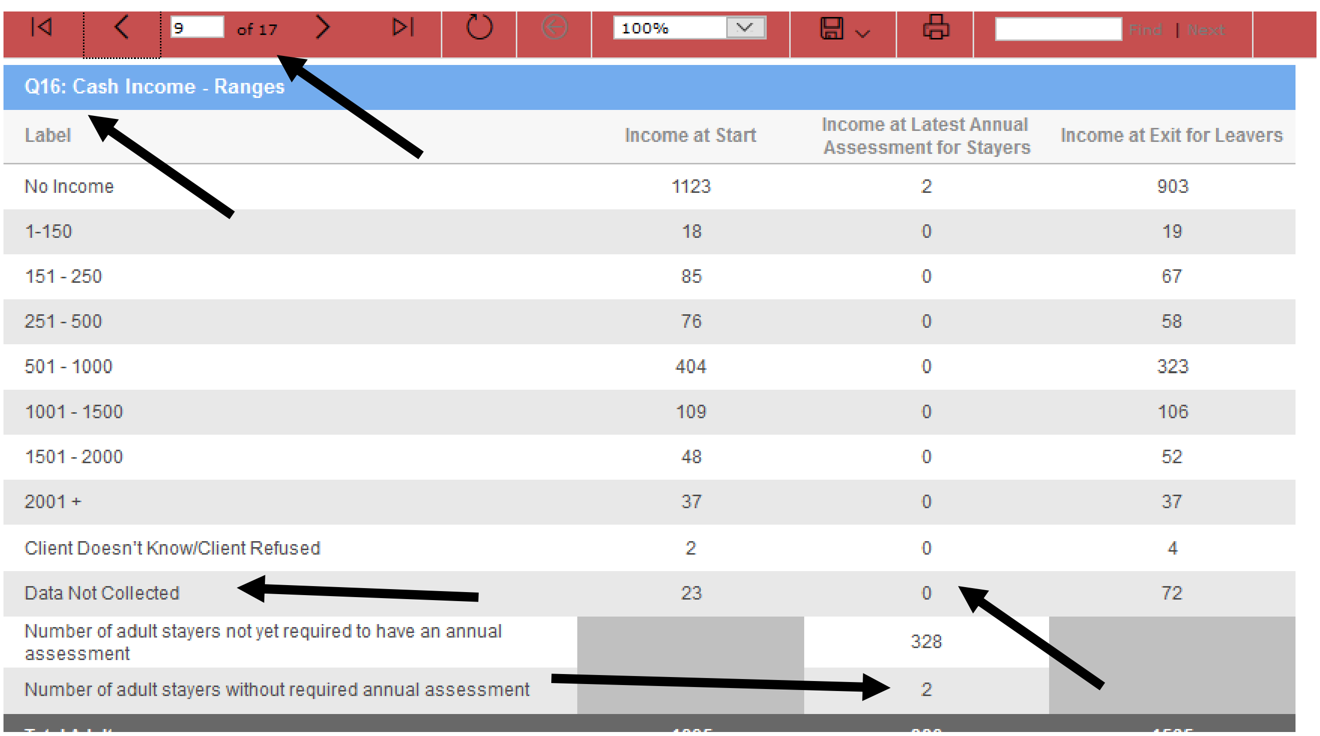
- Use the **Report** icon in the lower right corner of the screen to run the report 

    - It will take a few seconds to a few minutes for the report to load depending on the size

- When the report opens check to be sure the **date range** in the upper left side of the report is correct
- The **navigation arrows and icons** are on the top left side of the screen
    - Use these to navigate through the report pages



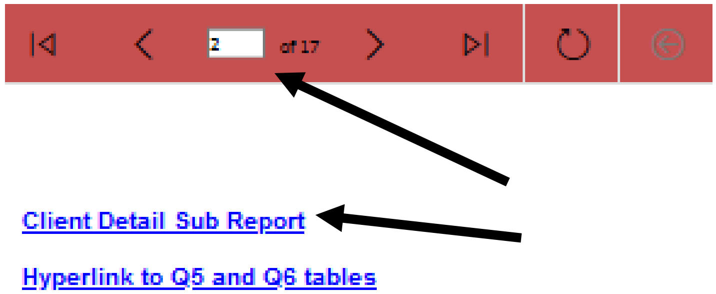
- **Go to page 9 of the APR report to get to the Q16: Cash Income – Ranges table**
    - Check for Data Not Collected as that may indicate missing values from a completed assessment
    - There should be a zero for Number of adult stayers without required annual assessment
        - If there is any other value then you have missed some assessments



Q16: Cash Income - Ranges

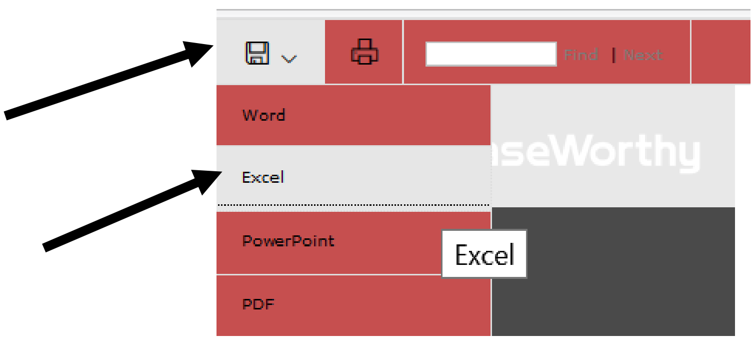
Label	Income at Start	Income at Latest Annual Assessment for Stayers	Income at Exit for Leavers
No Income	1123	2	903
1-150	18	0	19
151 - 250	85	0	67
251 - 500	76	0	58
501 - 1000	404	0	323
1001 - 1500	109	0	106
1501 - 2000	48	0	52
2001 +	37	0	37
Client Doesn't Know/Client Refused	2	0	4
Data Not Collected	23	0	72
Number of adult stayers not yet required to have an annual assessment		328	
Number of adult stayers without required annual assessment		2	

- If you have assessments not completed
- Go to **page 2** of the report and click on the Client Detail Sub Report link



- The <u>**Client Detail Sub Report**</u> link opens a report for all clients within the parameters
    - You can review the Enrollment Start Dates to determine who needs an annual assessment
        - If the Enrollment Start Dates are reviewed regularly it will be easier to identify any clients due for or missing assessments

- When the report opens use the disk icon at the top of the screen to export the report
- Select Excel to export all of the data into a single report



- The report has a column identifying whether or not an Annual Assessment is required
    - This will also provide the due date range for the assessment (30 days prior and 30 days after)

AF	AG	AH	AI
Annual Assessment Required	Annual Assessment Date Range	Enrollment Begin	Enrollment End
NO	-	2/6/19	12/4/19
YES	7/24/2020 - 9/22/2020	8/23/19	12/31/99
NO	-	9/24/20	12/31/99