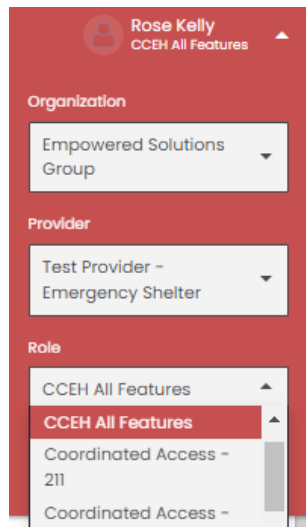# Annual Assessment Guide
Last Updated: January 2022 by CCEH

- Log in to HMIS
    - Make sure you are under the correct Organization/Provider/Role for your agency

- Use the 'Find Client' link on the left panel
    - Search by ID if available
    - Search by name and other criteria if needed
        - A duplicate client check prompt will display if searching without a client ID


- The screens may take a moment to load 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 open enrollments
    - Identify the enrollment needing an annual assessment
    - **Notate the Begin Date** as you will need this at the start of the workflow
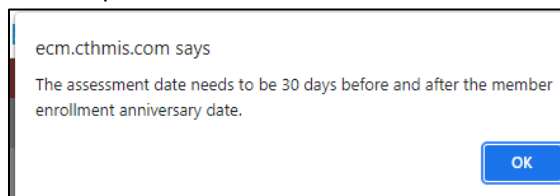
- Click on Case Management on the left panel
  - Click on Program Enrollment
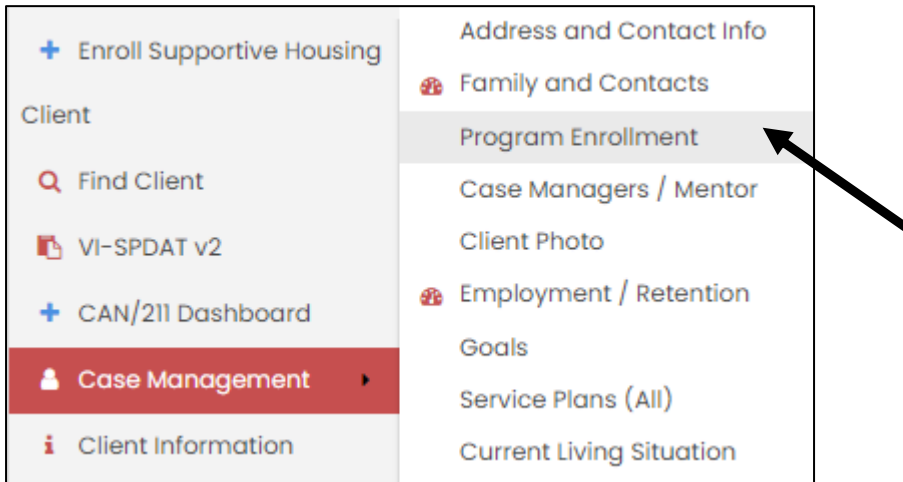
- Select the enrollment to update by clicking on the gear icon on the left
- Click on New 'Annual' Assessment
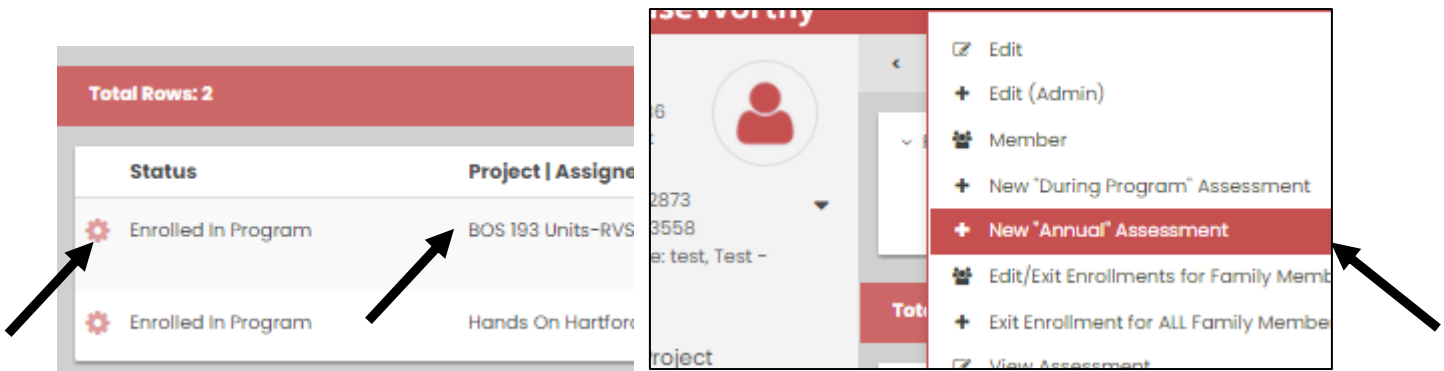
- You will see a prompt that asks you to enter the New Annual Assessment begin date
- The Assessment Begin Date must coincide with the annual anniversary date with parameters of 30 days prior to or 30 days after the initial enrollment date
  - You will get a prompt if you are attempting to enter the assessment outside of the 30 day parameters

ecm.cthmis.com says

The assessment date needs to be 30 days before and after the member enrollment anniversary date.

OK

- **Example:**
  - o Enrollment date is 09/30/2020 **assessments are completed after 1 year the initial enrollment**
  - o 30 days prior = 08/30/2021 to 09/30/2021
  - o 30 days after = 09/30/2021-10/30/2021
    - ▪ Assessment date must be between 08/30/2021 and 10/30/2021
      - • The date of 09/01/2021 allows the annual assessment workflow to open

New Annual Assessment ✕

Assessment Begin Date : 09/01/2021 📅

Save Cancel

During the Assessment workflow:

- You **may** get a prompt asking if you want to copy the assessment data from a previous assessment to the current assessment
  - o If assessments are available for copying, a prompt will show on the screen
- **It is not recommended to copy the assessment data so that all data being entered can be reviewed for accuracy**
  - o If appropriate click Yes and the assessment data will be copied
  - o If you select No to copying the assessment data the workflow will continue
    - ▪ Either way you will be prompted to continue entering any necessary information through the remainder of the workflow

Copy All Assessment Data ✕

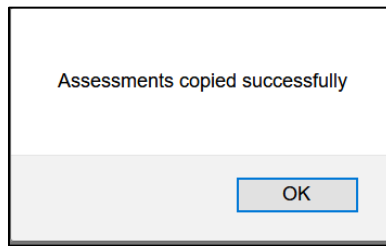Do you want to copy all assessment data ?

◉ Yes

◯ No

Done

Copy Assessments ✕

Date	Program Name	Type
◉ 10/1/2020	Test Setup 4.4 - Emergency Shelter	Annual

Select Family Members ✕

| #	Name	Select Program Name	
☑	1020 Test	10/1/2020 - Test Setup 4.4 - Emergency Shelter	🔍

Assessments copied successfully

OK

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

- The enrollment being assessed will show at the top of the screen
  - If there are multiple enrollments that could be updated, they will show in the drop down and you can select the appropriate enrollment using the drop down arrow

Assessment * | 9/1/2021 – BOS 193 Units-RVS-Middletown(PSH)(DMHAS)(CT0265) – Annual

| Assessment *	9/1/2021 – BOS 193 Units-RVS-Middletown(PSH)(DMHAS)(CT0265) – Annual		
	Date	Program	Type
	10/18/2017	Hands On Hartford-Neighborhood Services(SSO)	At Entry
	10/18/2017	Hands On Hartford-Neighborhood Services(SSO)	At Exit

- The Assessment workflow will open showing all of the steps that will need to be completed on the left
  - Fill in the data for each section using the drop down response selections or by entering the appropriate data
    - It is imperative that you select a response and/or enter data for every question in the assessment
    - **Do not leave any responses blank**
- Once you complete data entry for a step and click on **Save** in the lower right corner of the screen the workflow the steps on the left bring you to the next screen
  - The steps on the left will change color from grey to red as you progress through the assessment
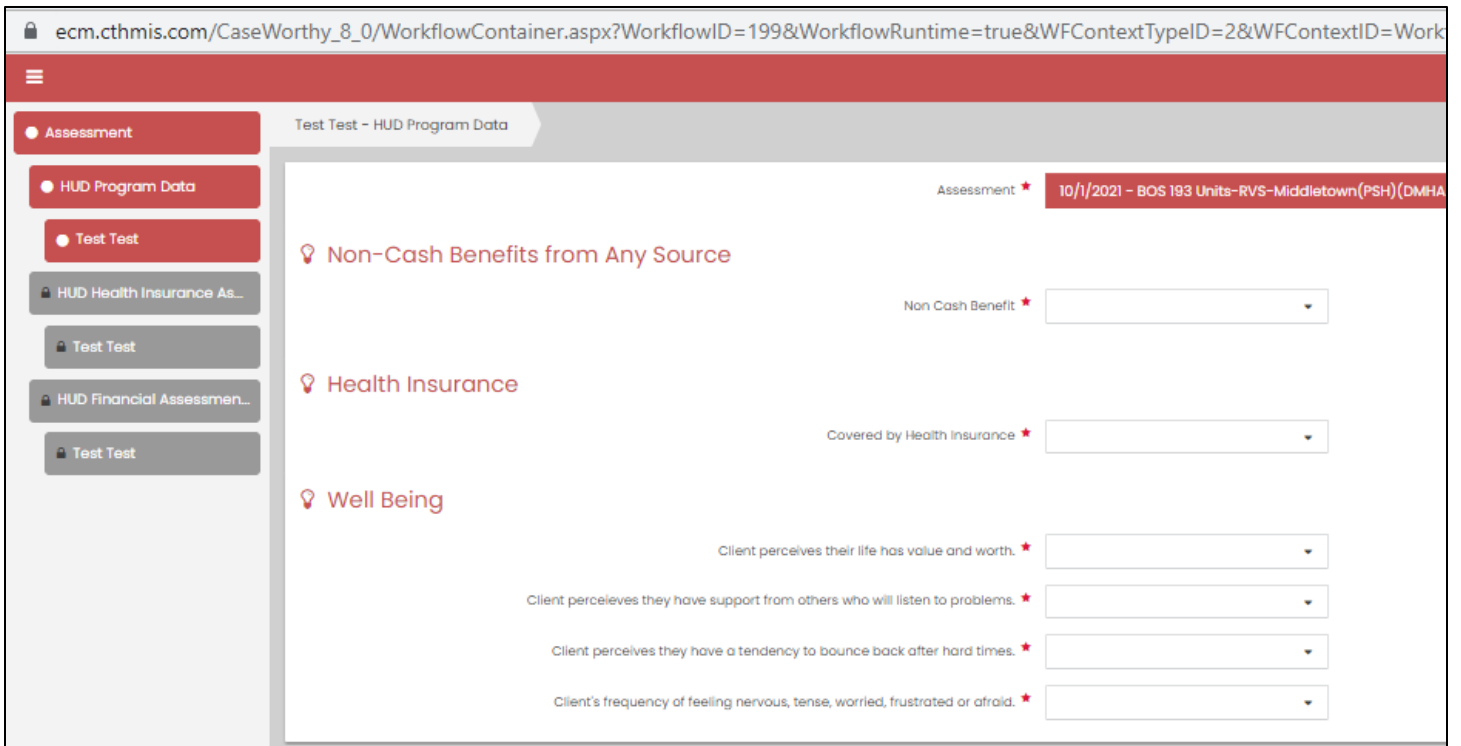
- When you have completed all the data entry, all of the steps on the left will be red and you can click on Finish Workflow in the top right of the screen
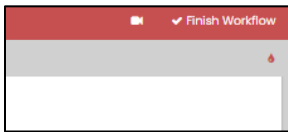
- Once you have finished the workflow, you will get a prompt showing that the assessment is complete
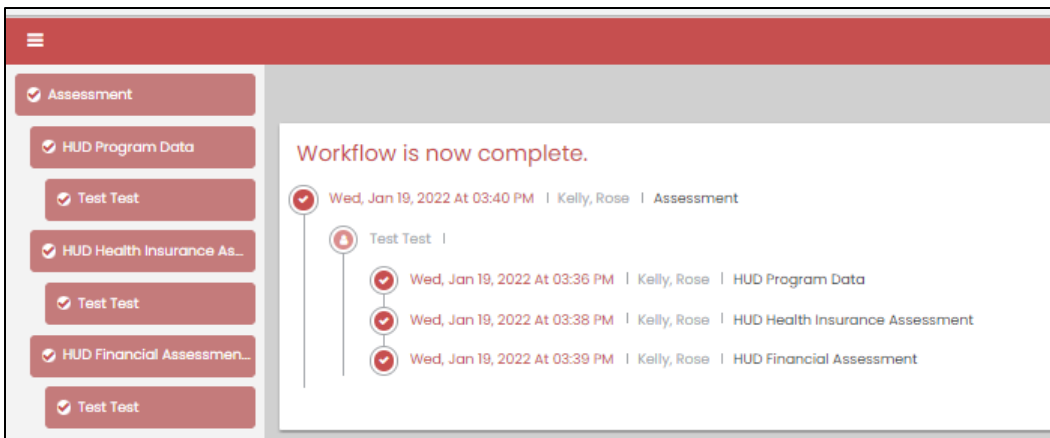
- Click Done in lower right corner to close the screen