# Alerts and Reporting for Annual Assessment
& In Permanent Housing Unit Status

The system by default will be providing a Case Manager alert(s) for Annual Assessments for all CoC and ESG funded projects and for In Permanent Housing Unit Status for all Rapid Rehousing projects. These alerts will be sent to Case Managers for enrolled clients that meet a data check threshold for each element as a reminder to help with data quality in PA HMIS.

These alerts will be broadcasted to each user in the top right corner of the window on the HOME tab/workspace, within the notification area directly to the left of your name, denoted by the bell symbol. Below shows an example of each type of alert you could receive for your active clients.
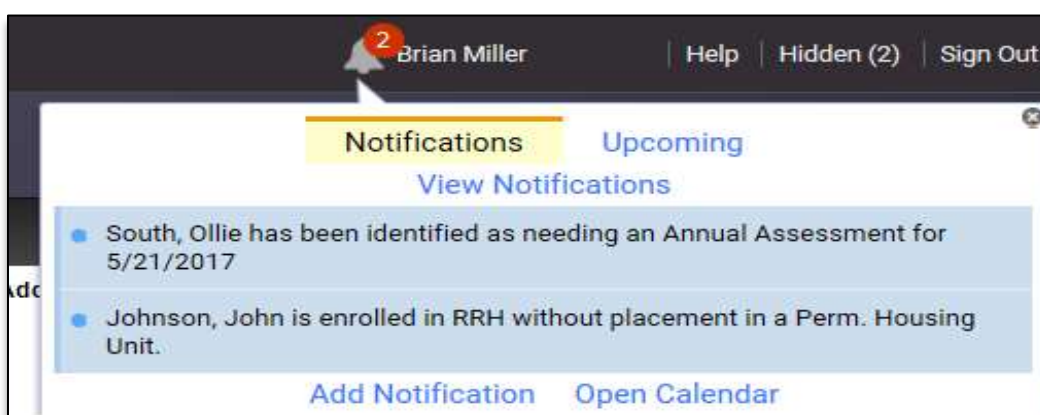
Annual Assessments – an Annual assessment is required to be collected for all stayers that are still active in your program for longer than 1 year, and continue to be required every year that they remain actively enrolled. An alert is sent for clients that have reached their Annual Assessment Date for the current year and identifies the date when the Annual Assessment should be collected on (which can be collected up to 30 days prior or after this date).

In Permanent Housing Unit –all households enrolled into a Rapid Rehousing project is required to collect and then update if necessary the In Permanent Housing Unit / Residential Move-In Date element. This element identifies the date when the household moved into a permanent housing unit during the enrollment and is associated to the head of the household client in HMIS. *A permanent housing unit is any fixed regular and adequate nighttime residence intended to be permanent.*

An alert is sent for households (head of household) that have been enrolled for over 60 days and have not yet been identified as moving into a permanent housing unit in HMIS. This includes households that have not recorded this element (missing) and those in which the permanent housing unit status is still set to 'No'.

*Please refer to the **Introduction to Annual Assessments** and the **In Permanent Housing Unit** guide for additional information on both of these data elements within the System Documents library in HMIS under System Feature Guides -> Client Management (within the HOME -> PA HMIS Account area).*

Reporting:

We have released reporting for these important data sets to allow Organizations and Case Managers to review their programs and clients current status for periodic review and to use for supplemental information in the event an alert from the system is received. These 2 reports are located under Home -> Case Manager Reports -> Client Program Reporting -> Data Quality Reports sections in the menu; the **Annual Assessment Data Check** and **In Permanent Unit Data Check** reports are shown below.

Annual Assessment Report-

The Annual Assessment report can be run for any project(s) for a specific date range and displays all enrolled clients, their current Anniversary Date (based on the timeframe of the report), their last Annual Assessment and their status for Annual Assessment and Financial Annual Assessment.

Annual Assessment Data Check Report
5/1/2017 to 5/31/2017

Client (ID)	Age	Enroll Date	Exit Date	Annual Anniversary (Allowed Range)*	Last Annual Assessment	Annual Data Check	Last Annual Financial	Annual Financial Data Check
HMIS Service Agency - ESG HP				**Homelessness Prevention**				
Client II, Test (80685)	11	12/1/2015		N/A		NOT REQUIRED		NOT REQUIRED
Client III, Test (80704)	28	12/1/2015		12/01/2016 (11/01/2016 - 12/31/2016)	12/1/2016	PASSED	12/1/2016	PASSED
Johnson, Bob (110541)	10	11/3/2016		N/A		NOT REQUIRED		NOT REQUIRED
Smith, Billy (108489)	38	8/18/2016		08/18/2017* (07/19/2017 - 09/17/2017)*		NOT REQUIRED		NOT REQUIRED
testein1, testing (96887)		5/2/2016		05/02/2017 (04/02/2017 - 06/01/2017)		FAILED (NOT RECORDED)		FAILED (NOT RECORDED)

The data check is geared toward Adults and Heads of Households and the data check shows whether an Annual assessment is Passed, Failed or Not Required. You can also run the report to only include those adults / heads of households that are in need of an Annual assessment.

In Permanent Housing Unit (RRH) Report-

The In Permanent Housing Unit report can be run for any Rapid Rehousing project(s) for a specific date range and displays all enrolled households, the head of household, and their current In Permanent Housing Unit status.

Rapid Rehousing - In Permanent Housing Unit - Report
1/1/2016 to 12/31/2016

Household	Client (Head of Household)	HH Size	Enroll Date	Exit Date	In Permanent Housing Unit	Residential Move-In Date
HMIS Service Agency - SSVF RR Program						
Aaron, Henry - 1985	Aaron, Henry (80970)	2	7/17/2015		Yes	12/31/2015
B. Smith Household	Smith, Benjamin (55565)	2	6/3/2014		Yes	6/28/2014
Johnson, Jim Household	Johnson, Jim (82381)	7	3/21/2016		Yes	3/24/2016
Johnson, John Household	Johnson, John (82916)	2	9/12/2016		No	
Johnson, Matthew Household	Johnson, Matthew (91179)	1	1/4/2016	1/13/2016	Yes	1/7/2016
Kenneth Ponder Family	Ponder, Kenneth T. (89068)	3	8/6/2015		Yes	8/6/2015

For those households that have been reported as being placed into a permanent housing unit during the enrollment will also display the residential move-in date recorded.