What is an annual assessment and how do I record them in HMIS?

HMIS Guide: Annual Assessment

February 2022

Diaz, Antonio
PA HMIS System Administrator

What is an Annual Assessment? An Annual Assessment is a snapshot at how the client is doing in the program year after year. This assessment is at a minimum broken down into three smaller assessments income and sources, non-cash benefits, and health insurance for adults. For minors you will complete at a minimum the health insurance assessment.

Who receives an Annual Assessment? All program components require an Annual Assessment for households that are in a given project for a year or more.

When do I complete an Annual Assessment? Data elements required for collection at annual assessment must be entered with and information date of no more than 30 days before or 30 days after the anniversary of the head of household's project start date, regardless of the date of the most recent 'update' or any other 'assessment'.

How do I know when a client needs an Annual Assessment? The easiest way to check to see who in your program is due for an Annual Assessment is to use the 'Open Enrollments' function on your Home workspace. From the left side menu on the Home workspace, choose the 'My ClientTrack' tab. Once the tab is opened click on 'Open Enrollments'.
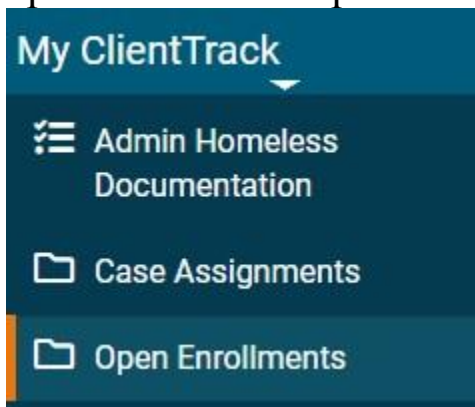

When the 'Open Enrollments' page is loaded use the Program dropdown menu to select the program you are working in and
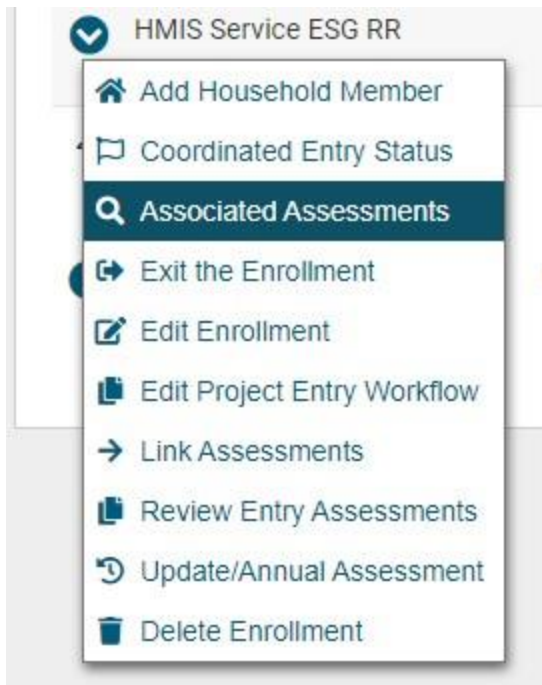
click on the search button. To see everyone in the program do not filter by client or grant. Every client actively enrolled in your program will load onto the page with a blue action button next to their name.
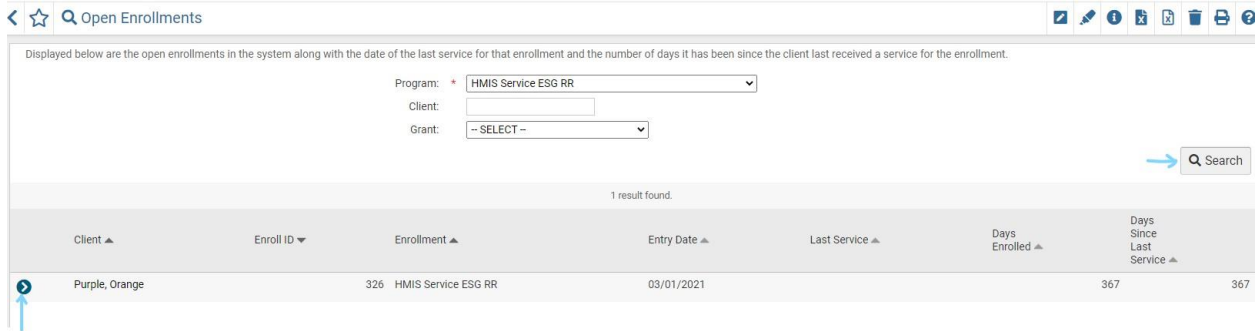
When looking at the 'Entry Date' listed for every client you can quickly see which clients are in their timeframe for an Annual Assessment. You can use the 'select' option on the blue action button to easily navigate to the client's dashboard and complete the Annual Assessment.
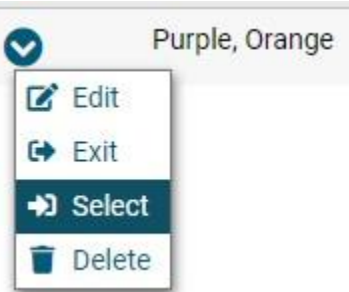
How do I check to see if an Annual Assessment has been completed for a client? After navigating to the client's dashboard click on the blue action button next to the enrollment. Choose 'Associated Assessments', this will load the assessments associated with the client. You will see the date and type of assessment completed for the client.

HMIS Service ESG RR

- Add Household Member
- Coordinated Entry Status
- Associated Assessments
- Exit the Enrollment
- Edit Enrollment
- Edit Project Entry Workflow
- Link Assessments
- Review Entry Assessments
- Update/Annual Assessment
- Delete Enrollment

Q Assessment Links

Below are the assessments that have been linked to this Enrollment. The Type of record and Assessment link type can be used to determine how they are linked to these other records.

2 results found.

Assessment Date ▲	Assessment Type ▲	Link Description ▲
03/02/2022	Annual	HMIS Service ESG RR
03/02/2022	Entry	HMIS Service ESG RR

How do I complete an Annual Assessment in PA HMIS? After navigating to the Clients Dashboard select the blue action button next to the Clients Enrollment and choose 'Update/Annual Assessment'.
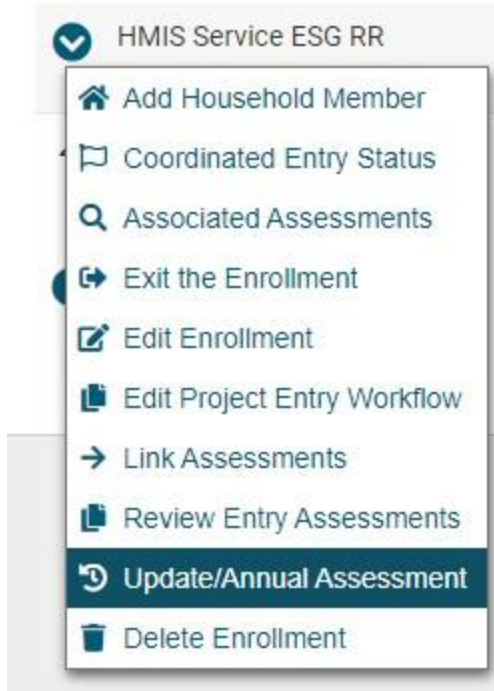
This will take you to the HUD Program Enrollment page where you can quickly review the information and update as needed. If you update the information, click on 'Save' to move to the next screen or if no updates were needed you can select 'No Changes' to move to the next screen.

	Name ▲	Gender ▲	Age ▲	Project Start Date ▲	Exit Date ▲	Case Manager ⓘ ▲	Relationship to Head of Household* ▲	Housing Move-in Date ▲
☑	Purple, Orange	Male	32	03/01/2021 📅		Antonio Diaz 🔍	Self	03/01/2021 📅
	1							

On the Type of Assessment Screen select 'New Annual Assessment'.

Type of Assessment

☐ New During Program Enrollment/Update Assessment

☐ New Annual Assessment

Follow the workflow until you see the 'You're done!' screen and click the box that says, 'Finish Close the workflow'.

You're done!
All required steps have been completed.

Finish
Close the workflow

Program Specific Data Collected for Annual Assessments

Depending on the projects funding source, you may see additional assessment data collection criteria. Below are the minimum data collection requirements from the 2022 HMIS Data Dictionary.

Data Collection Points for Annual Assessments include:

All Programs

4.02 Income and Sources (adults only)
4.03 Non-Cash Benefits (adults only)
4.04 Health Insurance (adults and minors)

HOPWA Only
W4 T-cell (CD4) and Viral Load (all household members with
AIDS)

CoC funded Permanent Supportive Housing Projects
C1 Well Being (head of household only)

SSVF and PATH
P4 Connection with SOAR (head of household and adults)
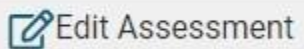

Common Errors with Annual Assessments
1. Error: Annual Assessment not completed.

Fix: Regularly check your Open Enrollments to see who is in their
timeframe for an Annual Assessment. This list can also be
exported to an Excel Sheet by clicking on the white page with an
'x' on it in the upper right section of the screen.

2. Error: Dates do not match on all Annual Assessment entries.

Fix: Go to 'Common Assessments' on the left side menu of the
Clients workspace. Open the tab and select 'Master Assessment'.
After the assessments page is loaded click on the blue action
button next to the Annual Assessment and select 'View Related
Assessments'. Click on the Edit Assessment box
and check the date and then make sure all the
other assessments listed on the page are dated the same as the
assessment date in the Master Assessment.

[Resources](#)

1. FY 2022 HMIS Data Standards Manual

https://www.hudexchange.info/resources/documents/FY-2022-HMIS-Data-Standards-Manual.pdf

2. FY 2022 HMIS Data Dictionary

https://www.hudexchange.info/resources/documents/FY-2022-HMIS-Data-Dictionary.pdf