Assessments

Last Updated: Sept 14, 2023

Summary

The purpose of this document is to provide instruction on managing Assessments in HMIS. This includes a basic overview and details on completing an intake assessment, update assessment, annual assessment, and exit assessment.

Assessments Overview

Assessments are accessed by going to a specific project, clicking on **Enrollments** on the left menu, clicking on a specific client name, then clicking on **Assessments** in the left menu. There are four types of assessments:

- **Intake Assessment** - form to be filled out during initial meeting with the client, during which the case manager gathers information to address the client's immediate needs and encourage engagement and retention in services
- **Update Assessment** - form to be filled out by case manager when gathering relevant information to update prior assessment data
- **Annual Assessment** - HUD-required form to be filled out by case manager when client has engaged in services for one year or more
- **Exit Assessment** - form to be filled out by case manager when client ends services and exits the program

Assessments Table

For each client enrollment in a project, you can access all of their assessments in the assessments table. From here, you can review or complete intake assessments and add update, annual, or exit assessments. The table shows when an assessment was completed or updated, as well as which user last completed or updated the assessment.

Assessments

Displaying **2** of **2** records | Filters | Sort

Assessment Date	Assessment Type	Last Updated
09/17/2021	Exit	11/18/2021 10:00 PM by Erma Jenkins
08/16/2021	Intake	03/08/2022 10:00 PM by Erma Jenkins

Intake Assessments

Intake assessments are automatically generated when you first enroll a client. If you do not complete the intake assessment at enrollment, the enrollment is not yet considered complete. The intake will be highlighted in red, with a warning symbol:

Assessment Date	Assessment Type
08/15/2023	Intake

You can also access an intake assessment on the Enrollment Overview page of a client. In the Enrollment Details section, hover over the blue paper icon by the entry date to display the text “Go to Intake Assessment.” Click on the blue paper icon to access the assessment.

Jerry Green Enrollment Details

Go to Intake Assessment

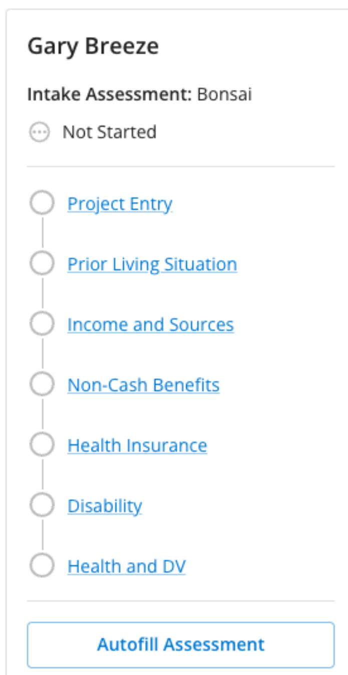
Entry / Exit Dates	08/04/2023 – Active
PATH Status	Data not collected
Move-in Date	Data not collected

Once inside the intake assessment, you will see a variety of fields depending on the program type and whether the client is an adult or Head of Household. Some of the topics in these fields might include:

- Project Entry
- Prior Living Situation
- Income and Sources
- Non-Cash Benefits
- Health Insurance
- Disability
- Health and DV

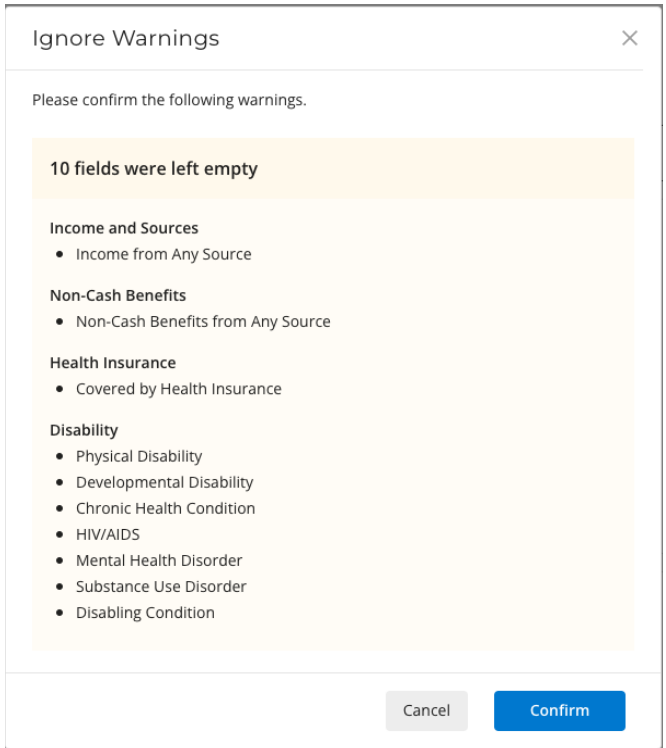
Some of these fields are required, and you will not be able to submit the assessment without completing the fields. Other fields are optional. If you have questions specific to a field in the intake assessment, please contact your CoC Administrator.

You can navigate to a specific section of the assessment by clicking on the navigational menu on the left.



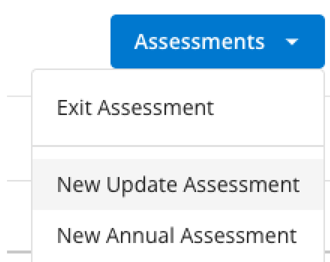
Once you are ready to submit the assessment, scroll to the bottom and click the **Submit** button. If you are not yet ready to submit, click the **Save and finish later** button.

When you submit, you may receive a pop-up with warnings. If the warnings are in red, you cannot submit the assessment without going back and correcting the identified issue. If the warnings are yellow, you may submit without entering these fields—but you should take a second glance to make sure it is filled out as much as possible.



Update Assessment

To add an Update Assessment, navigate to the Assessments table. In the top right corner, click the blue **Assessments** button. A drop down menu will appear. Click on **New Update Assessment**.



The Update Assessment operates similarly to the Intake Assessment in that specific fields may appear depending on the program type and whether the client is an adult orHead of Household. If you have questions specific to a field in the update assessment, please contact your CoC Administrator.

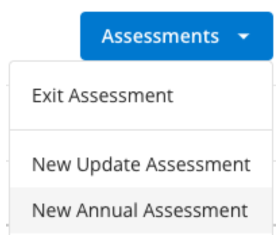
Some of these fields are required, and you will not be able to submit the assessment without completing the fields. Other fields are optional.

You can navigate to a specific section of the assessment by clicking on the navigational menu on the left. Once you are ready to submit the assessment, click the **Submit** button. If you are not yet ready to submit, click the **Save and finish later** button.

When you submit, you may receive a pop-up with warnings. If the warnings are in red, you cannot submit the assessment without going back and correcting the identified issue. If the warnings are yellow, you may submit without entering these fields—but you should take a second glance to make sure it is filled out as much as possible.

Annual Assessment

To add an Annual Assessment, navigate to the Assessments table. In the top right corner, click the blue **Assessments** button. A drop down menu will appear. Click on **New Annual Assessment**.



The annual assessment is required by HUD and as such, contains HUD specific fields for collection. If you have questions specific to a field in the intake assessment, please contact your CoC Administrator.

You can navigate to a specific section of the assessment by clicking on the navigational menu on the left. You can navigate to a specific section of the assessment by clicking on the navigational menu on the left. Once you are ready to submit the assessment, click the **Submit** button. If you are not yet ready to submit, click the **Save and finish later** button.

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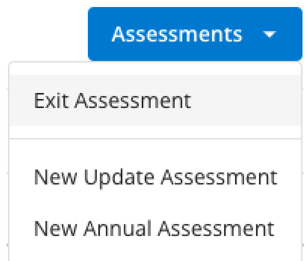
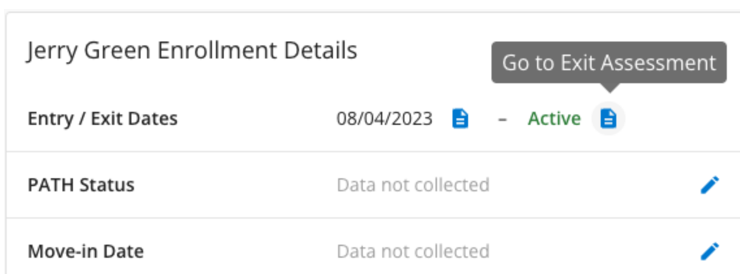
Exit Assessment

To exit a client from a program, you must fill out an Exit Assessment. In the top right corner, click the blue **Assessments** button. A drop down menu will appear. Click on **Exit Assessment**.



You can also access an intake assessment on the Enrollment Overview page of a client. In the Enrollment Details section, hover over the blue paper icon by the green Active text to display the text “Go to Exit Assessment.” Click on the blue paper icon to access the assessment.



Once inside the exit assessment, you will see a variety of fields. You must fill out **Exit Date** and **Exit Destination** in order to exit the client. There are a number of other fields related to income, insurance, and disability. If you have questions specific to a field in the exit assessment, please contact your CoC Administrator.

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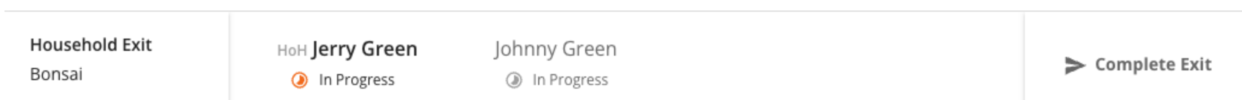
When you submit, you may receive a pop-up with warnings. If the warnings are in red, you cannot submit the assessment without going back and correcting the identified issue. If the warnings are yellow, you may submit without entering these fields—but you should take a second glance to make sure it is filled out as much as possible.

Once you submit the exit assessment, the client is officially exited from the program.

Completing Assessments for a Household

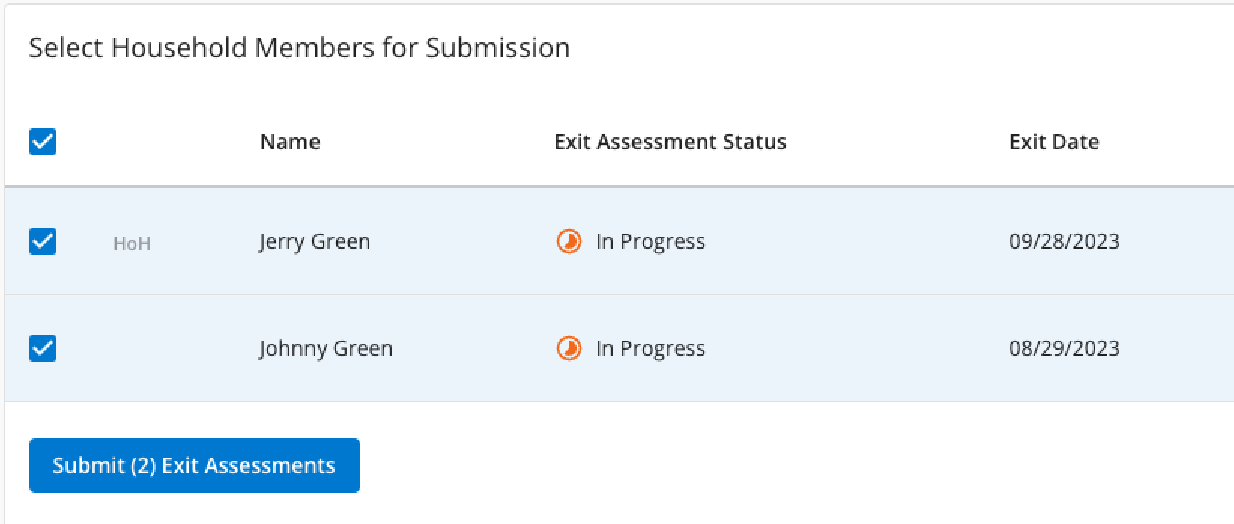
If you are completing assessments for someone who is part of a multi-member household, all members of the household will appear on the assessment screen as a separate tab. The progress bar under their name will indicate whether their assessment is Not Started, In Progress, or Submitted.



Fill out the first assessment, then click **Save Assessment** to save the assessment as In Progress. Click the **Next** button to navigate to the next member of the household.

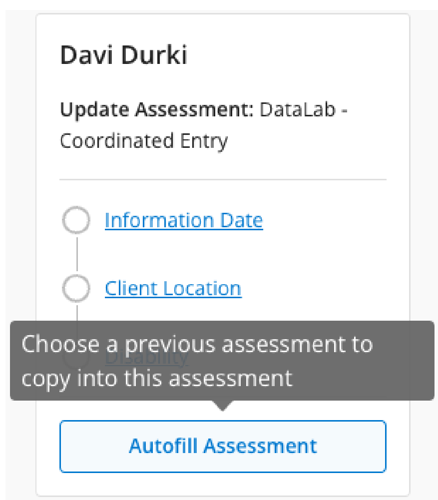
You can also click on a household member's name and you will be taken to their assessment. You do not need to fill out assessments for every household member.

Once you have finished filling out the intended assessments, click the **Complete** button on the top right. You will be taken to a summary screen that shows you a list of all household members. Click on the checkbox to the right of the household member you wish to submit an assessment for, then click the Submit button. This allows you to submit multiple assessments at once. You do not need to submit assessments for all members of the household at the same time.

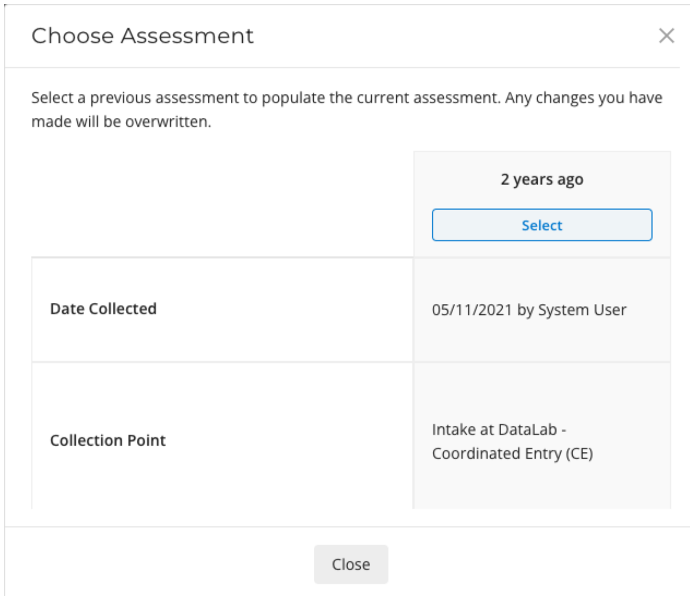


Autofilling an Assessment

If you are filling out an assessment for a client who has been previously enrolled in the program, you can automatically fill out certain fields instead of manually entering them. To do this, click on the **Autofill Assessment** button in the left navigation bar of a specific assessment.



A pop up will appear prompting you to choose an assessment from which to automatically fill in information. It will provide the date the previous assessment was collected and what the collection point was. In most cases, you will want to choose the most recent assessment completed. Click the **Select** button above the assessment information to autofill information from that assessment.



Updating Information on an Assessment

Once you have submitted any assessment, it is in a locked state. However, if you need to edit an assessment, you can unlock it by navigating to the specific assessment and clicking the “Unlock Assessment” button at the top.

This will make the assessment editable, then you can save your changes by clicking the Submit button.

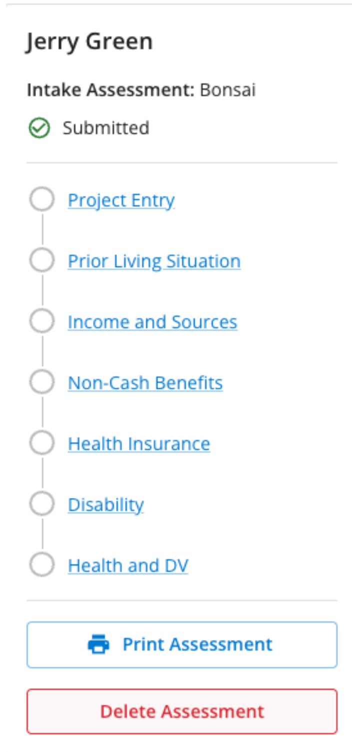
Deleting an Assessment

To delete an assessment, navigate to that specific assessment and click on the **Delete Assessment** button in the left navigation bar of a specific assessment.

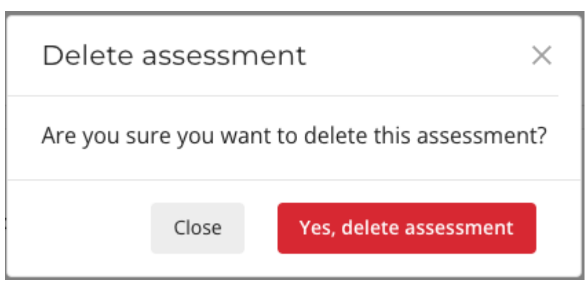
Please note:

- **Deleting an intake assessment will delete that client’s enrollment in the program.**
- **Deleting an exit assessment will delete that client’s exit from the program.**

- **You cannot delete an intake assessment for a Head of Household without changing the Head of Household to another member of the household.**



After clicking the delete button, a pop up will appear making sure you want to delete the assessment.



Once you select this button, the assessment will be deleted.