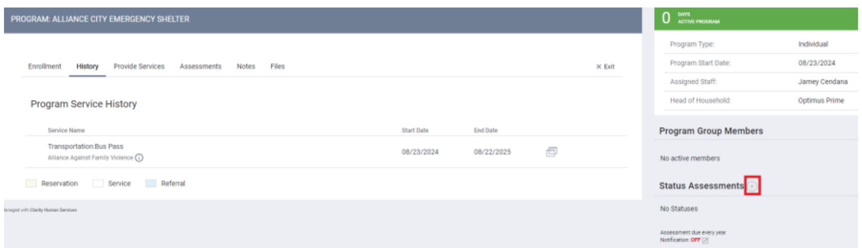
How to Complete Status or Annual Assessments

You will be required to complete an Annual Assessment on a yearly basis for all active clients. Status Assessments are required to capture significant changes for the client and can be completed at any time. It is best practice to add a Status Assessment each time your client has a change of income, new or worsening disability, or on a quarterly basis. Program Status and Annual Assessments correspond with the HUD HMIS Data Standards Data Collections stages “Occurrence Point/Update” and “Annual Assessment.”

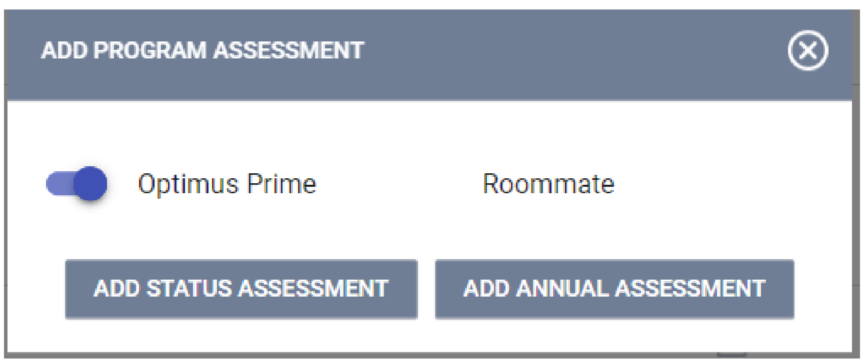
<u>Adding a Status or Annual Assessment</u>

To conduct a status assessment, begin by going to either the Programs tab or History tab in the client record. Find the program enrollment you wish to add a status assessment to and click the edit icon to the left of the enrollment.

1. Click the add button next to Status Assessments

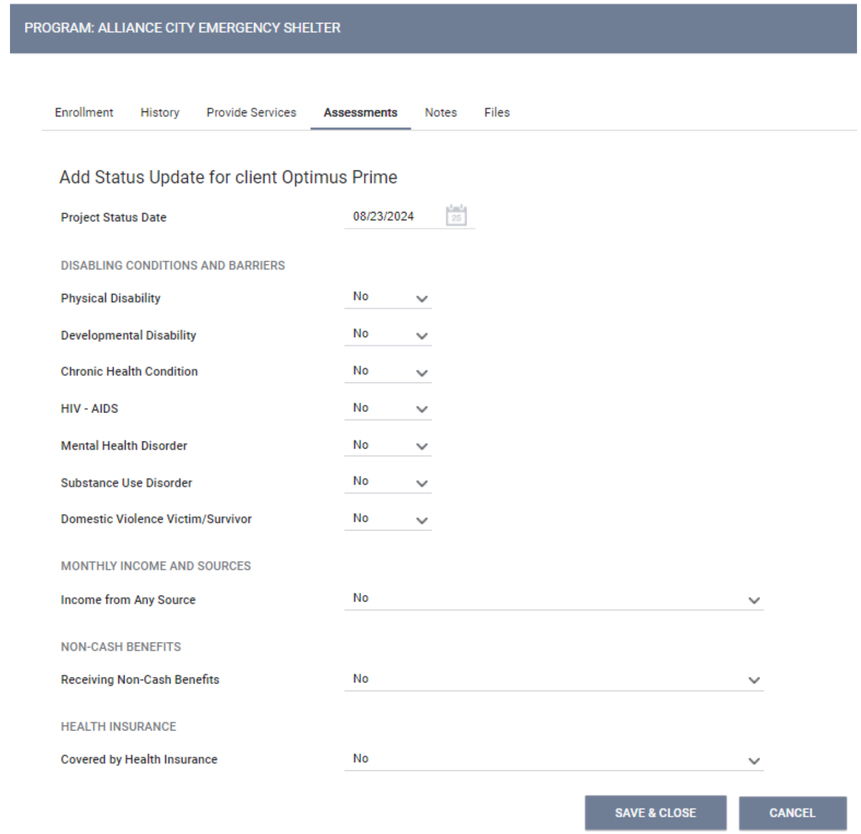


2. Select either Status or Annual Assessment



3. Select the client(s) you want to include an assessment for
4. Click Save & Close to complete

**Note: Some Fields will already be completed. This is because the data carries over from either the enrollment or the most recent assessment.



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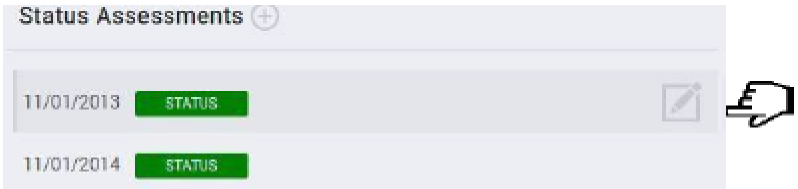
Making Changes to the Status or Annual Assessments

Completed assessments can be viewed and/or edited. Hover over the status and the edit icon will appear:



Assessment Due Warnings

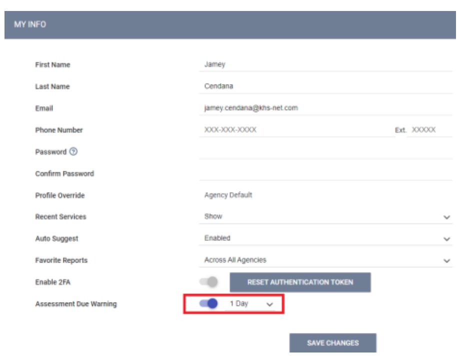
When a Status Assessment is due in a client record, Clarity Human Services sends a reminder ("Assessment Due Warning") to notify the staff member assigned to the enrollment that the due date is approaching.

What if I'm not receiving notifications?

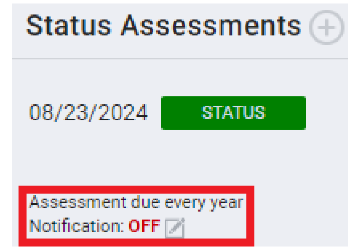
First, ensure that you're the assigned staff member for the enrollment. If a different staff members is later assigned to the enrollment, the staff member can update the setting at the enrollment level.

What if I don't want to receive notifications or want to receive them on a different schedule?

You can change the Assessment Due Warning setting for your Caseload in your Account Settings, but this change will only impact enrollments you are assigned to after the change is made. Current client records will remain on the old notification schedule until the end of their enrollments. Alternatively, you can change the Assessment Due Warning setting at the enrollment level.



To change the Assessment Notifications at the program level, click the edit icon located under the Status Assessments in the right side bar.



**Note: This setting will override the Assessment Due Warning notification setting at the staff-member level.