## <u>Annual Assessment Guideline (Agency Admin Version)</u>

04/18/2017

## **Purpose of Guide**

To help the Agency Admins distinguish between the use and appropriateness of annual assessments and interim updates in ServicePoint. To provide guidance when there is a #MULTIVALUE error within the Annual Assessment Calculator report.

Connect to ART -> Public Folder -> CoC Project Performance Scorecards -> ECHO HMIS Annual Assessments Calculator. Schedule the report for your program, specify the start and end dates. The reporting period should be for a full year.

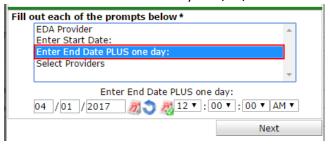
1. EDA provider leave as default provider



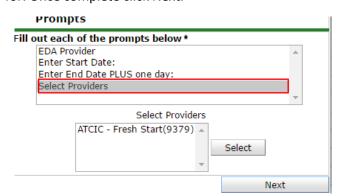
2. Select your start date. In this example I started with 04/01/2016



3. Enter End Date PLUS one Day - 04/01/2017



4. Select the Providers that you wish to run this report for. Once complete click Next.



5. If you choose, you may give this report a custom title. Choose Excel for report format and then choose once for interval. Click send. The report is now scheduled.

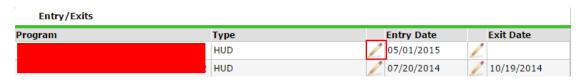


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There must be only one record for each data element annually with a Data Collection Stage recorded as 'annual assessment' associated with any given client and project entry ID within the 60-day period surrounding the anniversary of the client's Project Entry Date (30 days before/after). The #MULTIVALUE error within the annual assessments report indicates that there is more than one annual assessment during the reporting year.

39	150524	5/6/2015	5/6/2016	5/6/2016	Due	0
40	151257	9/20/2015	9/19/2016	9/20/2016	Due	1
41	151257	9/28/2015	9/19/2016	9/28/2016	Due	9
42	151936 5	5/1/2015	#MULTIVALUE	5/1/2016	Due	#MULTIVALUE
43	152426 8	5/1/2015	#MULTIVALUE	5/1/2016	Due	#MULTIVALUE

To fix this error go to the client's Entry for the specific program that you are seeing this #MULTIVALUE error. Click the edit pencil to open of your client's entry.



Click the interims icon to look at the annual assessment records.



## **Example of correct and incorrect Annual Assessments:**

The annual assessment would need to be completed within 30 days before or after the anniversary date of the client's project entry date (05/01/2017). The annual assessment on 05/01/2016 is correct since it falls within the 30 days before/after timeframe. The Annual assessment conducted on 03/25/2017 is incorrect since it was entered 34 days prior to the client's anniversary date, since this annual assessment is outside of the 30-day before/after window of the client's anniversary date the report will generate the #MULTIVALUE error due to this overlap within the reporting year. In this case, the assessment on 3/25/2017 should have been categorized as an "update". Change this assessment type to correct the #MULTIVALUE error.

