

Annual Assessment Guideline (End User Version)

04/18/2017

Intro

Annual assessment – Is a specialized subset of the ‘update’ collection point. The annual assessment must be recorded no more than **30 days before or after** the anniversary of the client’s *Project Entry Date*, regardless of the date of the most recent ‘update’ or ‘annual assessment’, if any [annually]. Information must be accurate as of the *Information Date*.

Per the HMIS Data Standards:

- The implementation of ‘annual assessment’ as a data collection stage for clients active in a program for a year is mandatory
- In order to be considered valid as an annual assessment, data must be stored with a *Data Collection Stage* of ‘annual assessment’ during the assessment period of **30 days before or after** the anniversary of the client’s Project Entry Date.

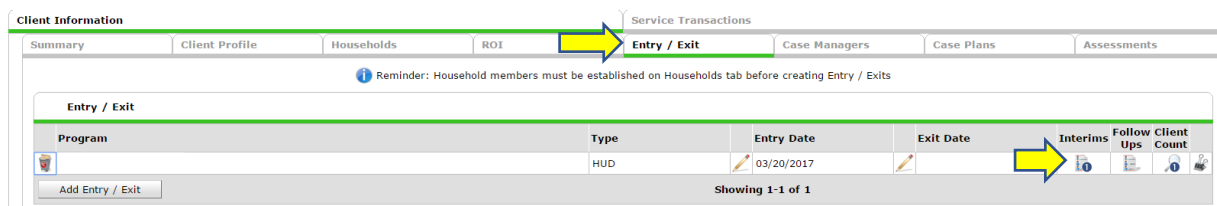
There must be **only one** record for each data element annually with a *Data Collection Stage* recorded as ‘annual assessment’ associated with any given client and project entry ID within **30 days before or after** the anniversary of the client’s *Project Entry Date*. Regardless of whether the responses have changed since project entry or the previous annual assessment, a new record must be created for each subsequent annual assessment such that it is possible to view a history, by date, of the values for each data element.

Purpose of Guide

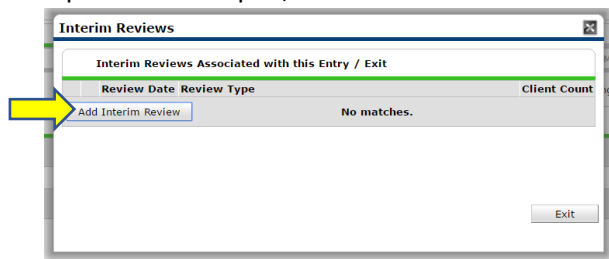
To help End Users in HMIS distinguish between the use and appropriateness of **annual assessments** and **interim updates** in ServicePoint. To provide examples of both annual assessment and interim updates and help the End User navigate to both within ServicePoint.

Navigation to an Annual Assessment and Interim Review Update in ServicePoint

After searching for and pulling up a Client in ServicePoint, you will navigate to the Entry/Exit tab. Next, click the ‘Interim’ button.



Once your Interim Review options box is open, click on the ‘Add Interim Review’ button to continue.



The Add Interim Review box will open. This is the time it is important to choose the appropriate interim review type. (Reminder: this type of review only applies to a client's record that is within the 30 days before or after the anniversary of the client's Project Entry Date) If you are within the window of Annual Assessment, select 'Annual Assessment' in the drop down, add the date and time of review and press 'Save & Continue' to take you to the Annual Assessment, fill in fully and save and exit. **Note:** You should not complete more than one of these updates Annually!

The screenshot shows a web form titled "Add Interim Review - (21) Patel, Dev". The form contains several fields: "Entry / Exit Provider", "Entry / Exit Type" (set to HUD), "Interim Review Type*", and "Review Date*". The "Interim Review Type*" dropdown menu is open, displaying a list of options: "-Select-", "-Select-", "30-Day Review", "60-Day Review", "90-Day Review", "120-Day Review", "Six Month Review", "Annual Assessment", and "Update". The "Annual Assessment" option is highlighted with a red rectangular box. The "Review Date*" field is set to 11:07:53 AM. At the bottom right of the form, there are two buttons: "Save & Continue" and "Cancel".

If your client is not within the 30-day window either before or after the anniversary of the client's project entry date and you have information that you need to update on a client's profile, you will choose the 'Update' drop down in the menu. (ex. Client's income changes more than 30 days after project entry date) **Note:** Adding updates between the time of an Annual Assessment will help the Annual Assessment take less time to complete when due.

This screenshot is identical to the one above, showing the "Add Interim Review" form. In this instance, the "Update" option at the bottom of the "Interim Review Type*" dropdown menu is highlighted with a red rectangular box, while "Annual Assessment" is no longer highlighted.

After you have completed either your Annual Assessment or Interim Update, you will press 'Save & Continue' to exit out of the Review tabs in ServicePoint. Your 'Interims' visual in your Entry/Exit tab will now have an updated number of interims attached to this Client's file.

