

Annual Assessment Guideline (Agency Admin Version)

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

Fill out each of the prompts below *

EDA Provider
Enter Start Date:
Enter End Date PLUS one day:
Select Providers

EDA Provider
-Default Provider- Select

Next

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

Prompts

Fill out each of the prompts below *

EDA Provider
Enter Start Date:
Enter End Date PLUS one day:
Select Providers

Enter Start Date:
04 / 01 / 2016 12 : 00 : 00 AM

Next

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

Fill out each of the prompts below *

EDA Provider
Enter Start Date:
Enter End Date PLUS one day:
Select Providers

Enter End Date PLUS one day:
04 / 01 / 2017 12 : 00 : 00 AM

Next

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

Prompts

Fill out each of the prompts below *

EDA Provider
Enter Start Date:
Enter End Date PLUS one day:
Select Providers

Select Providers
ATCIC - Fresh Start(9379) Select

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.

Schedule Report

Schedule

Name * ECHO HMIS - Annual Assessments Ca

Report Format * Excel

Users
Inbox Search My User Clear

Interval * Once

Start Date * 04 / 18 / 2017 11 : 01 AM

End Date * 04 / 18 / 2017 11 : 01 AM

Send





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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	5/1/2015		#MULTIVALUE	5/1/2016	Due		#MULTIVALUE
43	152436	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.

Entry/Exits			
Program	Type	Entry Date	Exit Date
[Redacted]	HUD	 05/01/2015	
[Redacted]	HUD	 07/20/2014	 10/19/2014







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

Household Members Associated with this Entry / Exit						
Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	F
  [Redacted]		 05/01/2015				

Include Additional Household Members Showing 1-1 of 1












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.

Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups
  [Redacted]		 05/01/2015			

Include Additional Household Members Showing 1-1 of 1

Interim Reviews

Interim Reviews Associated with this Entry / Exit			
Review Date	Review Type	Client Count	
  03/28/2017	Annual Assessment		
  05/01/2016	Annual Assessment		
  12/31/2015	Update		

Add Interim Review Showing 1-3 of 3

Household (151936) cern... Age: 61 Exit