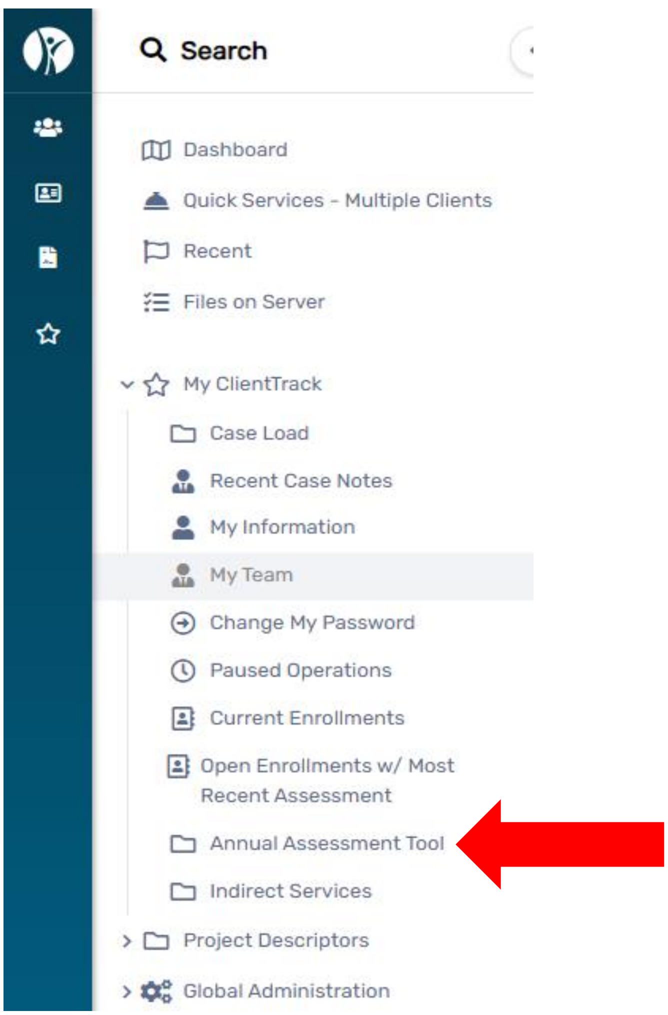
HOW TO GUIDE
ANNUAL ASSESSMENT TOOL

The Annual Assessment Tool is now available to all active end users in HMIS and DV ClientTrack. This exciting new tool will provide a simple and quick way to view the clients with Annual Assessments due or overdue. HUD requires the completion of an Annual Assessment for clients enrolled in a project for one year or more.

- **Annual Assessments:** Data collection must include an "Annual Assessment" for all persons in the project for one year or more. Data elements required for collection at "Annual Assessment" must be entered with an Information Date (5.04) of no more than 30 days before or after the anniversary of the Head of Household's Project Start Date, regardless of the date of the most recent "Update" or any other "Annual Assessment".

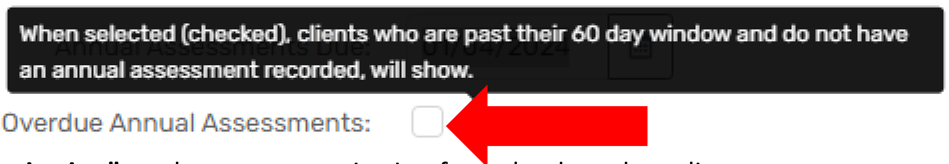
The **"Annual Assessment Tool"** is found on the **"HOME"** Workspace.

Select the **"My ClientTrack"** option located in the left menu on the **"HOME"** Workspace, then select **"Annual Assessment Tool"**.



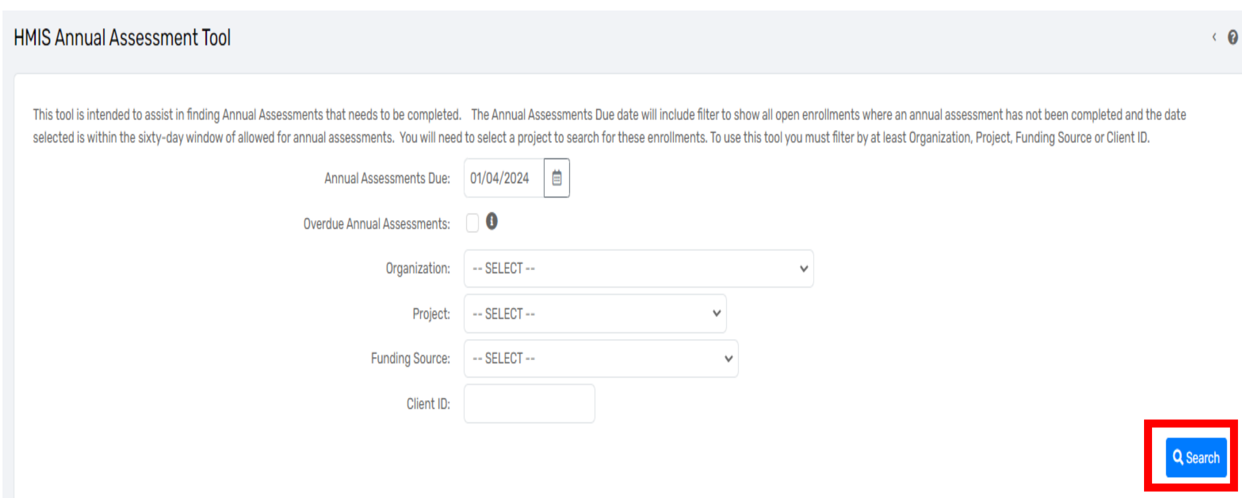
Next, complete the information required:

- **"Annual Assessments Due**" – enter the appropriate date (the system will default to the current date)
- **"Overdue Annual Assessments"** – if this box is checked the system will display clients who are past their 60-day window and do not have an annual assessment recorded.



- **"Organization"** – select your organization from the drop-down list.
- **"Project"** – select the project from the drop-down list.
- **"Funding Source"** – select the funding source (grant) from the drop-down list.
- **"Client ID"** – you can enter a specific client ID# to see if the client is due or overdue for an Annual Assessment

PLEASE NOTE: You have the option to sort by "Organization", "Project", "Funding Source" or "Client ID". For example: if you only select your "Organization" from the drop-down list, then ALL clients who are currently due for an Annual Assessment (or Overdue if you selected the Overdue checkbox) will appear on the report. If you want to pull the clients for a specific "Project" then you will need to filter by "Organization" AND "Project" by making the appropriate selections from those drop-down lists.



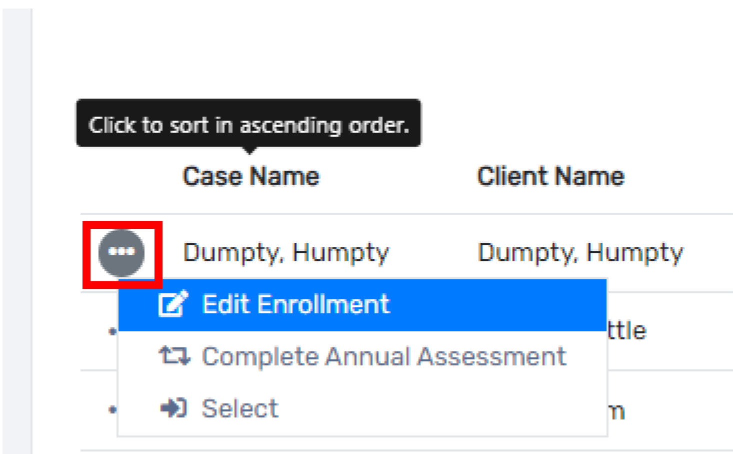
Next, select **"Search"**

A list of clients will appear. The snip below is from the HMIS Training database:

13 results found.

	Case Name	Client Name	Enroll ID	Project Name	Entry Date	Anniversary Date	Start of 60 Day Window	End of 60 Day Window	Days Enrolled	Case Manager
•••	Dumpty, Humpty	Dumpty, Humpty	1675873	My Fake Organization CoC RRH (RRH-R8)	01/12/2022	01/12/2023	12/13/2022	02/11/2023	722	
•••	BoPeep, Little	BoPeep, Little	1675872	My Fake Organization CoC RRH (RRH-R8)	02/16/2022	02/16/2023	01/17/2023	03/18/2023	687	
•••	Thumb, Tom	Thumb, Tom	1675871	My Fake Organization CoC RRH (RRH-R8)	03/07/2022	03/07/2023	02/05/2023	04/06/2023	668	
•••	Star, Shining	Dipper, Little	1675775	My Fake Organization ES (ES-R8)	11/21/2022	11/21/2023	10/22/2023	12/21/2023	409	
•••	Star, Shining	Star, Shining	1675774	My Fake Organization ES (ES-R8)	11/21/2022	11/21/2023	10/22/2023	12/21/2023	409	
•••	Vader, Darth	Vader, Darth	1675771	My Fake Organization SSVF HP (HP-R8)	11/10/2022	11/10/2023	10/11/2023	12/10/2023	420	
•••	Mercury, Red	Mercury, Red	1675755	My Fake Organization PATH (SO-R8)	08/17/2022	08/17/2023	07/18/2023	09/16/2023	505	

Click on the three dots to the left of the client's name to access the functions available which are **"Edit Enrollment"**, **"Complete Annual Assessment"** (launches the Annual Assessment workflow), or **"Select"** (takes you to the client's dashboard screen).



Please contact your respective helpdesk with any questions.

HMISHelpDesk@ihcda.IN.gov or DVHelpDesk@ihcda.IN.gov