

CAS Update Assessments

Introduction

CAS enrollments, like any HMIS enrollment, can have Update Assessments. Use an Update Assessment when:

- Documents are uploaded – While your client is enrolled in CAS, you will need to update their documentation by uploading documents to CAS Document Check. As a best practice you should also complete an update assessment any time you upload a document outside of the entry workflow.
- VI-SPDAT is completed – While your client is enrolled in CAS, you will need to complete their VI-SPDAT and record it in HMIS. As a best practice, you should also complete an update assessment when you record the VI-SPDAT outside of the entry workflow.

Current Living Situation is a required page of the Update Assessment. The following is an excerpt from the HMIS Data Standards produced by HUD:

“Contacts: CE projects are expected to record every direct contact made with each client in the HMIS via data element 4.12, Current Living Situation. A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts include activities such as a conversation between the street outreach worker and the client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service. A Current Living Situation (4.12) must be recorded anytime a client is met, including when a CE Assessment (4.19) or CE Event (4.20) is recorded on the same day.

On occasion, it is expected that a Continuum project that does not participate in HMIS by collecting and entering client-level data will be a source of information about the whereabouts of a client. The Current Living Situation data element will be one factor in reporting to determine whether a CE client is still actively seeking assistance. As a result, it may be necessary for the CE project to record that element on behalf of a nonparticipating project. In those cases, the CE project will use the field ‘Living Situation verified by’ to document the Project Name of the project that reported an updated status for the client during case conferencing.”

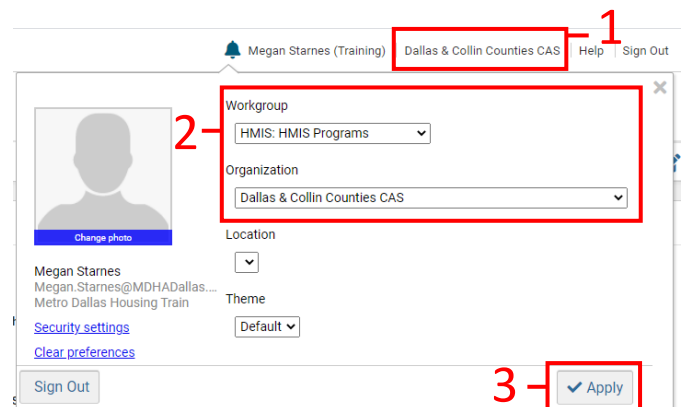
1. Confirm your ClientTrack settings

Workgroup: HMIS: HMIS Programs

Organization: Dallas and Collin Counties CAS

Steps:

1. After logging in to ClientTrack, click on your agency name in the top right corner of the page.
2. Use the drop-down menu to change your organization to Dallas & Collin Counties CAS. Confirm your workgroup is HMIS: HMIS Programs.
3. Click Apply.

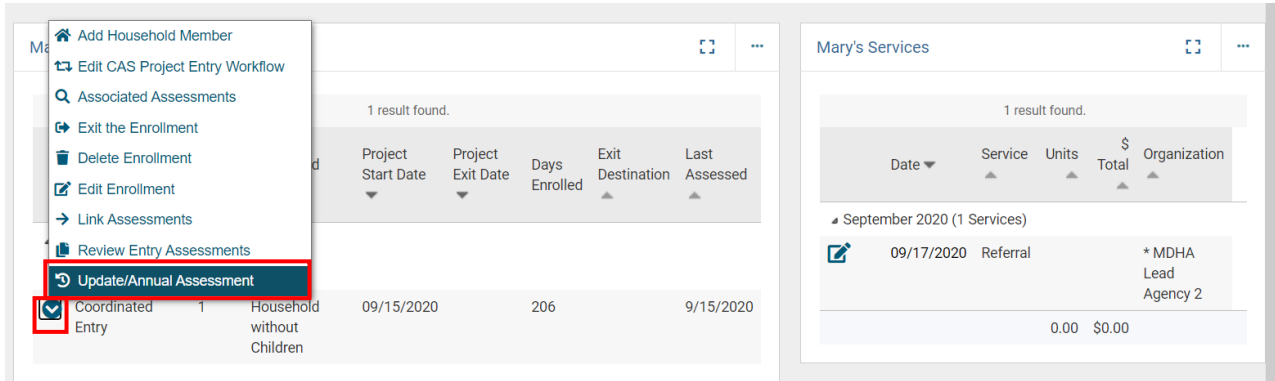


2. Complete the CAS Update Assessment

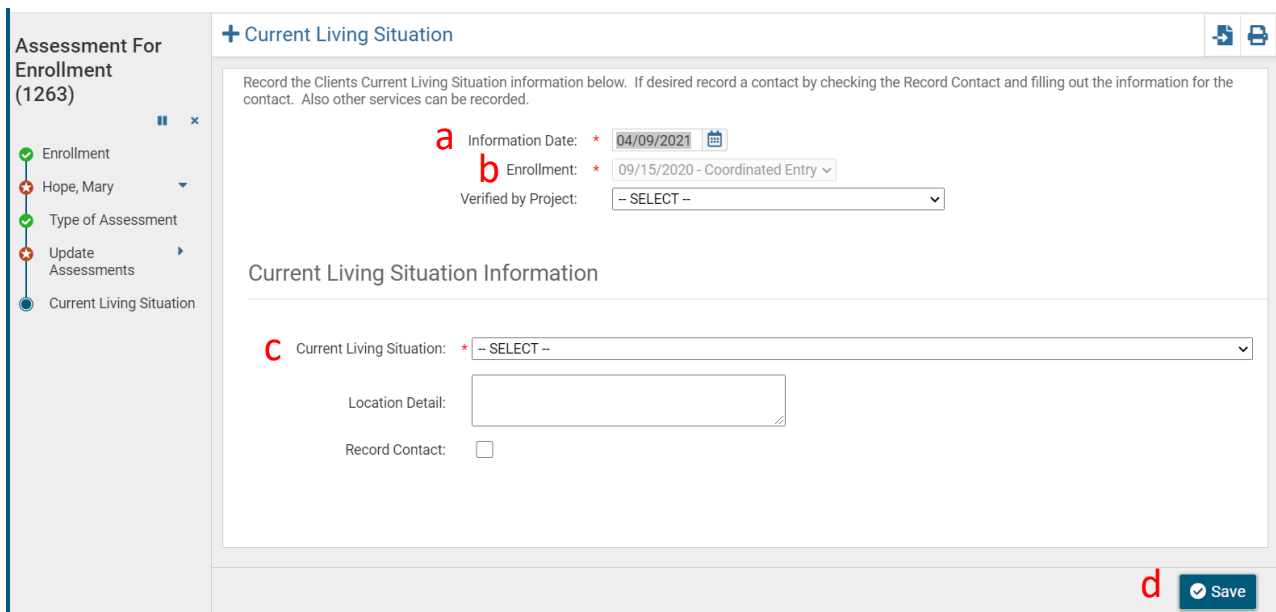
Where: Clients Workspace

Steps:

1. Navigate to your Client’s Workspace. On the menu, search for your Client in the system
2. On the client’s Dashboard, find the CAS enrollment and click the action arrow. Then choose Update/Annual



3. Confirm client’s information and choose During Program Enrollment (Update) Assessment, as usual.
4. Record the client’s Current Living Situation
 - a. Confirm the Information Date
 - b. Record if the Current Living Situation was reported by a different project
 - c. Record the Current Living Situations
 - i. *NOTE: Some responses may produce additional required questions. Answer all questions that appear in response to recording Current Living Situation.*
 - d. Click Save.



5. Work until you get to the end of the workflow and click Finish.

