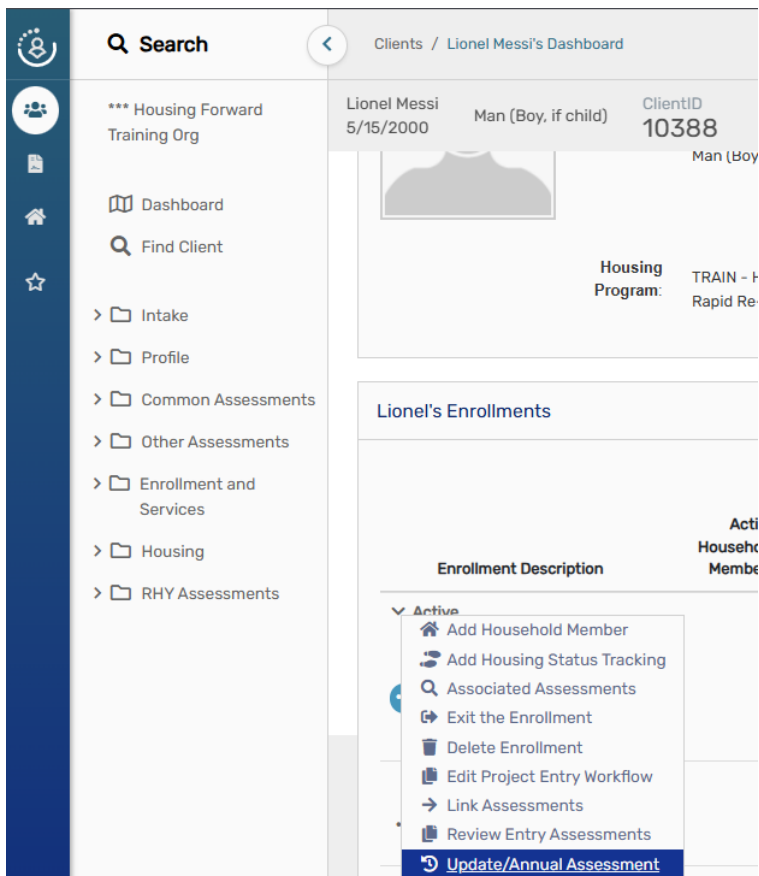


Create an Update or Annual Assessment

Steps

1. Log in to ClientTrack and navigate to your **Clients Workspace**. Find your client in the system.
2. Click the **three dots** and select **"Update/Annual Assessment"** on the enrollment you wish to add an Update Assessment to.



The screenshot shows the ClientTrack interface. On the left is a sidebar with navigation icons and a search bar. The main content area displays the client profile for Lionel Messi, including his name, date of birth (5/15/2000), gender (Man (Boy, if child)), and ClientID (10388). Below the profile information is a section titled "Lionel's Enrollments". A dropdown menu is open, showing various actions available for the enrollment, with "Update/Annual Assessment" highlighted at the bottom.

Enrollment Description	Acti Househo Membe
▼ Active	
🏠 Add Household Member	
👤 Add Housing Status Tracking	
🔍 Associated Assessments	
🔄 Exit the Enrollment	
🗑️ Delete Enrollment	
📄 Edit Project Entry Workflow	
➔ Link Assessments	
📋 Review Entry Assessments	
🔄 Update/Annual Assessment	

3. The HUD Program Enrollment screen allows you to verify enrollment information. Typically, you will click No Changes here however, there are some options to record data here depending on your program type. You may see:

- Date of Engagement – street outreach and some emergency shelter programs
- Housing Move-in Date – some housing programs

Assessment For Enrollment (1263)

HUD Program Enrollment

Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

The Project Start Date is:

- For **Street Outreach** projects - It is the date of first contact with the client.
- For **Emergency Shelters** - It is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without "exiting and restarting" for each stay for a specified period.
- For **Safe Havens and Transitional Housing** - It is the date the client moves into the residential project (i.e. first night in residence).
- For all types of **Permanent Housing**, including **Rapid Re-Housing** - It is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
 - Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify - though all documentation may not yet have been gathered)
 - The client has indicated they want to be housed in this project
 - The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time
 - For all other types of Service projects including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: * ASC - Emergency Shelter (E/E) ⓘ

Household

Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

☐	Name	Gender	Age	Project Start Date	Exit Date	Case Manager ⓘ	Relationship to Head of Household*
☒	test_hmis	Female	33	05/09/2022	MM/DD/YYYY	Haley Walton	Self

Save **No Changes**

4. Next, select whether you are recording an **Update** (During Program Enrollment) Assessment, or an **Annual** Assessment.

Assessment For Enrollment (2323)

Type of Assessment

Enrollment

★ Messi, Lionel

⊙ Type of Assessment

○ Non-CAS Assessment

○ Messi, Baby

Pause **Cancel**

New During Program Enrollment/Update Assessment

New Annual Assessment

NOTE: Annual assessments may only be completed within a 60-day window – within 30 days prior to and 30 days after the anniversary of the project start date.

NOTE: If an update or annual assessment has already been recorded, first you will see the option to create a new assessment or “edit existing”. If you need to create a new assessment, choosing that option will then prompt you to choose Update or Annual.

5. **Complete the assessment** with all the client’s updated information. Use the **default button** on each page first, when available, to have the system pre-populate the most recently recorded information for the client. Then you can edit the information based on what is accurate and true for the client on the day of assessment. **If there are no changes to a certain data element, use the default button and save to continue.**

Assessment For Enrollment (1263)

test, hmis 2/15/1989

ClientID 4

Universal Data Assessment

Enrollment

test, hmis

Type of Assessment

Update Assessments

test, July

Pause

Cancel

Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Default Last Insurance Status

Covered by Health Insurance: No

Type	Status	Reason No	Other Coverage
Private	No	-- SELECT --	
Private - Employer	No	-- SELECT --	
Private - Individual	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
State Children's Health Insurance Program S-CHIP	No	-- SELECT --	
Military Insurance	No	-- SELECT --	
State Funded	No	-- SELECT --	
Combined Children's Health Insurance / Medicaid Program	No	-- SELECT --	

Save

6. Complete the workflow for any family members. **Choose the same option** here that you chose for your head of household.

Assessment For Enrollment (1263)

test, July 3/12/2015

ClientID 5

Type of Assessment

Enrollment

test, hmis

test, July

Type of Assessment

(not complete) Assessments

Pause

Cancel

New During Program Enrollment/Update Assessment

New Annual Assessment

7. Always work to the end of the workflow and **click Finish** to close the workflow.

