

## **HMIS Document**

## **ClientTrack User Guide**

## Creating Interim Update and Annual Assessments

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## ClientTrack User Guide – Interim Update and Annual Assessments

- 1. Go to enrollments while on a client's record.
  - a. Click on the three small dots icon in front of the program enrollment that needs an interim update or annual assessment added.
  - b. On your list of assessment options, select "Update/Annual Assessment".

Coalition for the Homeless	Jim Carey 4/11/1972 Client Male 703	Active Enrollment Household Ho Description Members Tyr
Dashboard Q Find Client	Jim's <mark>Enrollments</mark>	<ul> <li>Active</li> <li>PH - Rapid Re-Housing</li> </ul>
<ul> <li>Intake</li> <li>Family Members</li> <li>CE Status</li> </ul>		Coalition for the Ho Homeless-DCF ESG- 1 wit CV Housing & Support Chi Add Household Member
C Profile     C Enrollment and Services	Enrollment Hc Description M ~ Active	Q Associated Assessments Exit the Enrollment C Edit Enrollment Jin Edit Project Entry Workflow
<ul> <li>Enrollments</li> <li>Housing Program</li> <li>Eligibility and</li> <li>Availability</li> </ul>	Coalition for the Homeless-DCF ESG- CV Housing & Support Services:RRH	
<ul> <li>Quick Services</li> </ul>		

- 2. Ensure the correct program is identified and the names of all affliated household members are listed and checked, then at the bottom right corner, click "Save".
  - a. If this interim update is for a housing project (ie PSH or RRH), the housing move-in date may be added on this screen by scrolling to the right.

				ss services and housing a reasonably short amo		e expectation is the project has a	a housing	opening (on-site, site-	-based, scattered-sit	te su
	For all other	r types of Si	ervice pr		limited to: services only	y, day shelter, homolessness prev ision of service.	vention, c	oordinated assessment	it, health care it is the	e dat
				Projec		iomeless-DCF ESG-CV Housing 8	2 Sunnort	Sarvinas-DDH		
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xcerp	her in one dw	elling unit (	or, for pe	rsons who are not hous Project	ed, who would live tage	ther in one dwelling unit if they w		ed)." Relationship to	Housing Mc	ove-i
xcerp	Name Carey,	elling unit ( Gender	or, for pe	Project Start Date	ed, who would live toge Exit Date	ther in one dwelling unit if they w Case Manager	vere hous	ed)." Relationship to Head of Household*	Housing Mo Date	ove-i

- 3. Select your desired interim assessment, Update or Annual.
  - a. For an interim update assessment, select "New During Program Enrollment/Update Assessment" – these may be completed any time the worker is made aware of an update to income, non-cash benefits, health insurance status, disability status, DV status, or housing status (ie. If they become housed).
  - b. To complete an Interim Annual Assessment, select the second option.

i. This option should be selected when a household has been enrolled for 1 year or longer and should be completed within a 30 day window of their enrollment anniversary.

Type of Assessment	Enrollment/Update Assessment
	New Annual Assessment

- 4. The system will prompt you to complete the interim update or annual assessment across various screens for all affiliated household members. Complete each section and at the bottom right corner, select "Save" or "Save and Close" each time until the full assessment is complete.
  - a. You also have the option to "Default to Client's Last Assessment" in cases where information has not really change and you'd like it to populate with the previous

Assessment For Enrollment * (1263)	Jim Carey Male 703   A ≜   ∷ Universal Data Assessment <	0	
<ul> <li>Enrollment</li> <li>Torey, Jim</li> <li>Type of Assessment</li> </ul>	or missing required data links		
Update     Assessments     Pause X Cancel	Assessment Date: * 07/22/2022		
Trause Cancer	Assessment Type: * During Program Enrollment/Update  Assessor: * Racquel McGlashen Q Program: Coalition for the Homeless-DCF ESG-CV Housing & Support Services:RRH	)	
	Client Location Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Client location will be defaulted to the program's CoC within a workflow. Client Location: * FL-507 - Orlando/Orange, Osceola, Seminole Counties CoC *) © Save		

b. Continue responding to all required sections until the "Finish and Close" workflow screen is displayed.