



HMIS Document

ClientTrack User Guide

Creating Interim Update and Annual Assessments

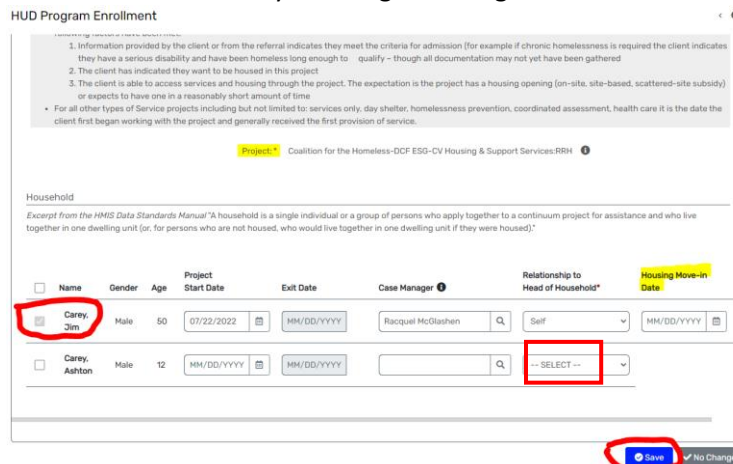
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ClientTrack User Guide – Interim Update and Annual Assessments

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”.



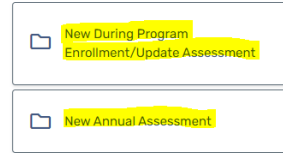
2. Ensure the correct program is identified and the names of all affiliated household members are listed and checked, then at the bottom right corner, click “Save”.
 - a. If this interim update is for a housing project (ie PSH or RRH), the housing move-in date may be added on this screen by scrolling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



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.

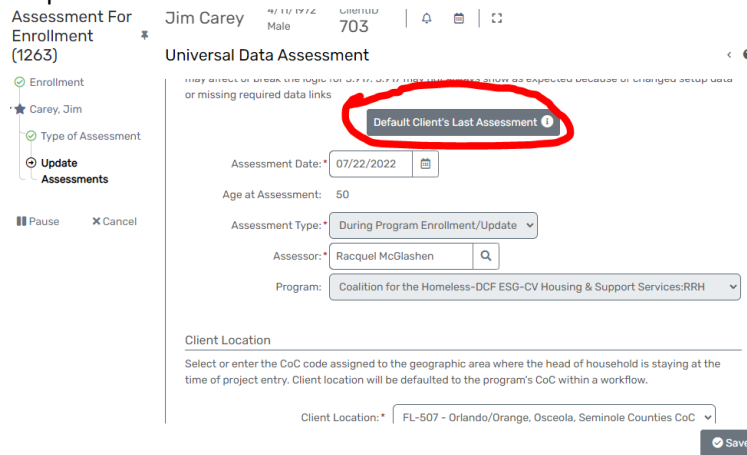
- i. This option should be selected when a household has been enrolled for 1 year or longer and should be completed within a 30 day window of their enrollment anniversary.

Type of Assessment



- 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 responses.



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