Reassessments– Job Aid

The Reassessments dashboard will list any clients that are due for a reassessment based on a calculation from their enrollment date.

All active clients must have update assessments completed quarterly. The first update assessment reminder will appear on the Reassessment tab of the dashboard 60 days after the enrollment date. The second update assessment reminder will appear 150 days after the client's enrollment date. The third update assessment reminder will appear 240 days after the client's enrollment date. All update assessments must be completed by the due date listed, which is 30 days after the date the reminder appears on the reassessment tab.

If a client appears due for an update assessment, but their information has not changed since the last assessment, the user has the option to select a box on the reassessment tab "Program Verifies That an Update Assessment is Not Currently Needed." Selecting this box will remove the client's name from the reassessment tab. Please note that this box is disabled for annual assessments and exit assessments, both of which must be completed.

Clients who are enrolled in a program for 12 months or longer must have an annual assessment completed every year. The annual assessment must be completed either 30 days before or 30 days after the anniversary date of the client's enrollment. The Reassessment tab on the dashboard is a tool to view what clients are due for a reassessment and when the reassessment is due.

To ensure that annual assessments are done correctly and on time, users will only be able to select and complete an annual assessment between day 335 and day 395 after the client's enrollment (30 days before to 30 days after the anniversary date of enrollment). During this time period, users will not be able to create an update assessment until an annual assessment is completed.

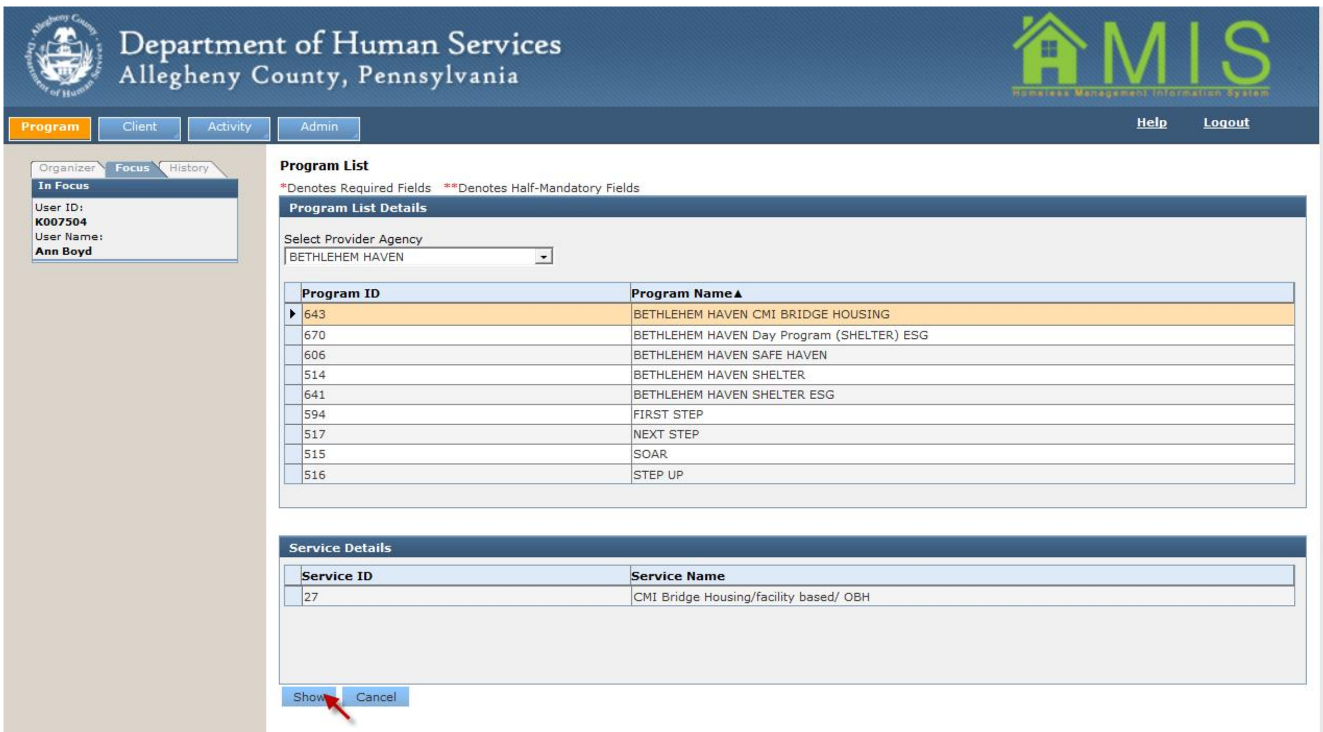
Users will not be able to create an exit assessment for a client who has been enrolled 366 days to 395 days until an annual assessment has been completed.

If an annual assessment has not been completed for a client by day 396, users will not be able to create an annual, update or exit assessment for the client. They will need to contact the DHS service desk and HMIS specialist, who will unlock and create an annual assessment using a date that falls within 30 days before or 30 days after the client's enrollment anniversary date. The date will be provided by the user. Once the annual assessment has been unlocked and created by either the DHS service desk or the HMIS Specialist, the user must complete the annual assessment within 48 hours. Once the annual assessment is completed, the user will be able to create update and exit assessments.

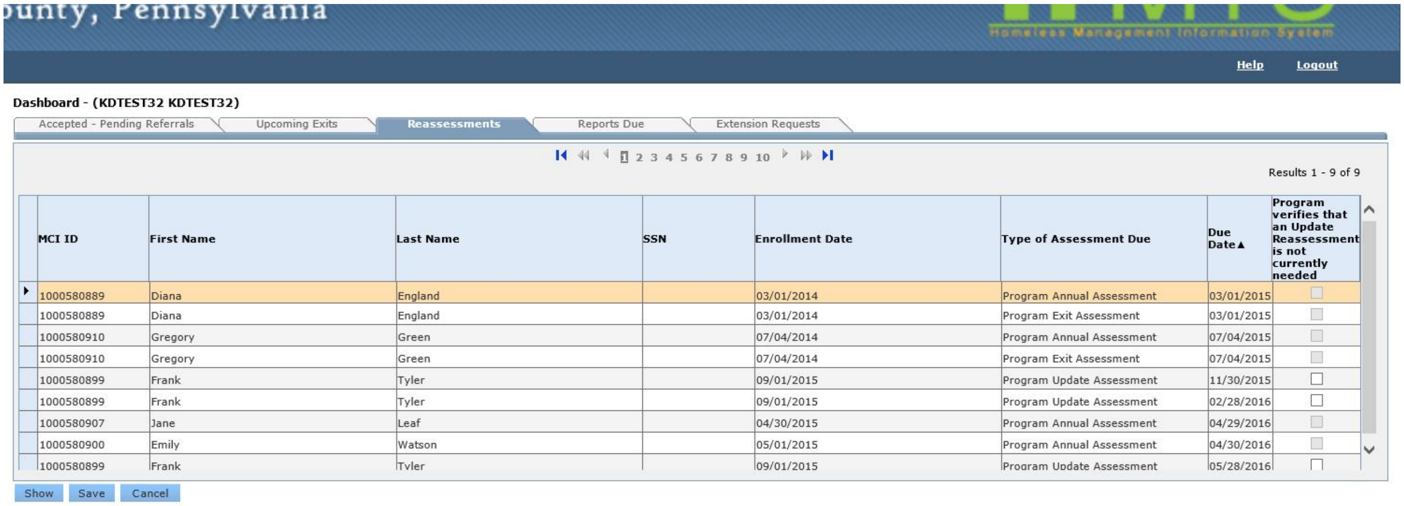
If a client remains enrolled in the program 30 days after their anniversary date has passed, the system will update the anniversary date year to the next year.

Programs that have an estimated exit date calculated by HMIS will show clients due for exit assessment when they are within 30 days of their estimated exit date. If a program extension is needed, please request one in HMIS. For technical assistance, please see the *Requesting Program Extensions* job aid.

Viewing the Dashboard's Reassessment tab

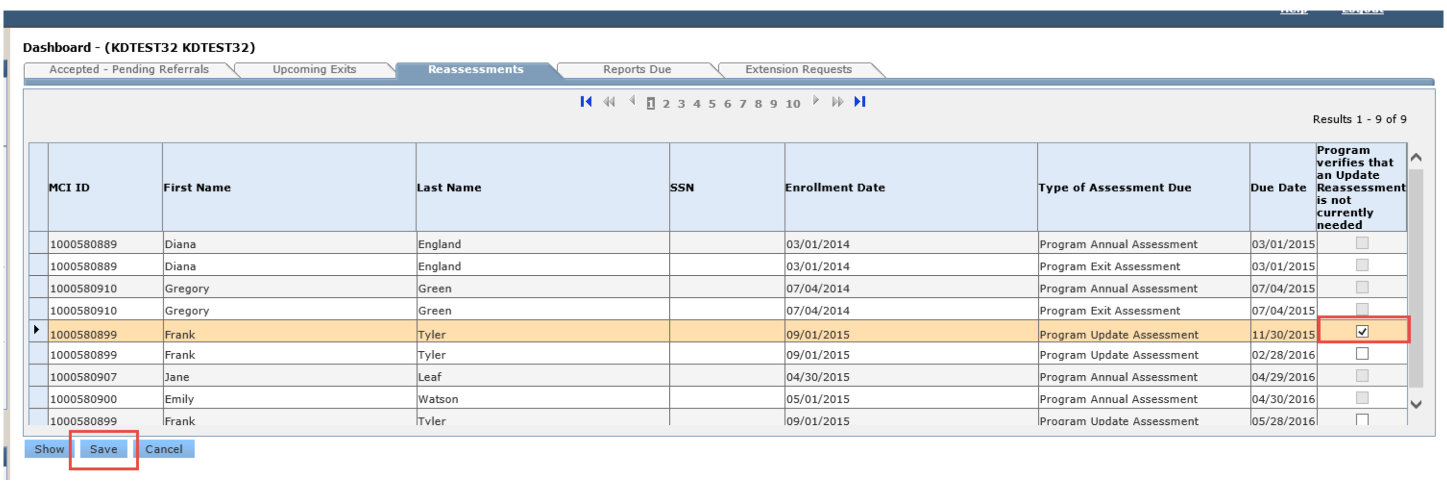


1. To view your dashboard, log into HMIS and select your program.
   a. Navigate to *Program List.* Select the program to work with and click Show to bring it into focus. You will be brought to your *Dashboard*.



MCI ID	First Name	Last Name	SSN	Enrollment Date	Type of Assessment Due	Due Date ▲	Program verifies that an Update Reassessment is not currently needed
1000580889	Diana	England		03/01/2014	Program Annual Assessment	03/01/2015	
1000580889	Diana	England		03/01/2014	Program Exit Assessment	03/01/2015	
1000580910	Gregory	Green		07/04/2014	Program Annual Assessment	07/04/2015	
1000580910	Gregory	Green		07/04/2014	Program Exit Assessment	07/04/2015	
1000580899	Frank	Tyler		09/01/2015	Program Update Assessment	11/30/2015	
1000580899	Frank	Tyler		09/01/2015	Program Update Assessment	02/28/2016	
1000580907	Jane	Leaf		04/30/2015	Program Annual Assessment	04/29/2016	
1000580900	Emily	Watson		05/01/2015	Program Annual Assessment	04/30/2016	
1000580899	Frank	Tyler		09/01/2015	Program Update Assessment	05/28/2016	

b. Select the *Reassessments* tab.
c. Clients listed here are due for reassessment, either update or annual.
d. Select the name of a client due for reassessment and click Show to go to the *Assessment Creation* screen and begin new assessment.
e. Once the annual or update assessment has been completed, the client's name will fall off of the *Reassessment* tab. Assessment reminders will appear for each client every 60 days with a due date 30 days later.



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1000580910	Gregory	Green		07/04/2014	Program Exit Assessment	07/04/2015	
1000580899	Frank	Tyler		09/01/2015	Program Update Assessment	11/30/2015	☑
1000580899	Frank	Tyler		09/01/2015	Program Update Assessment	02/28/2016	
1000580907	Jane	Leaf		04/30/2015	Program Annual Assessment	04/29/2016	
1000580900	Emily	Watson		05/01/2015	Program Annual Assessment	04/30/2016	
1000580899	Frank	Tyler		09/01/2015	Program Update Assessment	05/28/2016	

f. If there are no changes to the client's information at the time an update assessment is due, the user should check the box *Program Verifies that an Update Assessment is Not Currently Needed* and click Save. The client's name will drop off the list until they are within 60 days of the next assessment quarter. Please note that the *Program Verifies than an Update Assessment is Not Currently Needed* is disabled when annual and exit assessments are due.

The Reassessment Cycle

1. The reassessment cycle functions as follows:

    a. 60 days after enrollment, the client will appear on the Reassessment tab for their first update assessment. The first update assessment should be completed within 30 days of the client's name appearing; the due date is listed. The client's name will continue to appear until an assessment has been completed.

    b. 150 days after enrollment, the client will appear on the Reassessment tab for their second update assessment. The second update assessment should be completed within 30 days of the client's name appearing; the due date is listed. The client's name will continue to appear until an assessment has been completed.

    c. 240 days after enrollment, the client will appear on the *Reassessment* tab for their third update assessment. The third update assessment should be completed within 30 days of the client's name appearing; the due date is listed. The client's name will continue to appear until an assessment has been completed.

    d. If there are no changes to client information at the time reassessment is due, the program should check the *Program Verifies that an Update Assessment is Not Currently Needed* box and save the screen so the client's name will drop off the list until the next assessment quarter. **This box will be disabled when an annual or exit assessment is due.**

    e. 335 days after enrollment, the client will appear on the *Reassessment* tab for their annual assessment. The annual assessment should be completed within 60 days of the client's name appearing; the due date is listed. The client's name will continue to appear until an assessment has been completed.
        i. **Please note that all programs receiving HUD funding are <u>required</u> to complete an annual assessment yearly and on time. Programs that receive HUD funding <u>must</u> complete an annual assessment for all clients thirty days before or up to thirty days after their enrollment anniversary yearly. <u>Even if there are no changes to client information, an annual assessment must be completed on time</u>**.
        ii. During the 335-395 day period (30 days before and 30 days after the enrollment anniversary date), the user will not be able to create an update assessment until an annual assessment is completed.
        iii. During the 366-395 (30 day period after the enrollment anniversary date), the user will not be able to create an exit assessment until an annual assessment is completed.
            1. If an annual assessment has not been completed for a client by day 396, users will not be able to create an annual, update or exit assessment for the client.

2. If this occurs, the user will need to contact the DHS service desk and the HMIS specialist, who will unlock and create an annual assessment using a date that falls within 30 days before or 30 days after the client's enrollment anniversary date.
3. Once the annual assessment has been unlocked and created by either the DHS service desk or the HMIS Specialist, the user must complete the annual assessment within 48 hours. Once the annual assessment is completed, the user will be able to create update and exit assessments.

For more information…

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.