

A woman with dark hair, wearing a light green sweater over a white collared shirt, is seated at a desk. She is looking down at a tablet device she is holding with both hands. The background is slightly blurred, showing what appears to be a wooden chair and a wall with some framed items. The overall lighting is soft and indoor.

HMIS QUARTERLY SPOTLIGHT

# Annual Assessments

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# Main menu

- ① What is an Annual Assessment
- ② How to complete an Annual Assessment
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- ④ Annual Assessments in Reporting





02

# How to Complete an Annual Assessment

01

Create an Interim Review

02

Review Type:  
Annual Assessment

03

Select Annual Assessment in window

The screenshot shows a software interface with a table of 'Entry / Exit' records. The table has columns for Program, Type, Project Start Date, Exit Date, Interims, Follow Ups, and Client Count. The 'Project Start Date' column is highlighted with a red box. An 'Interim Reviews' modal window is open, displaying a list of reviews with columns for Review Date, Review Type, and Client Count. The first review is highlighted in green.

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
All Chicago - (Project Template) - Rapid Re-housing (1155)	HUD	11/26/2024		3	1	1

  

Review Date	Review Type	Client Count
11/29/2025	Annual Assessment	1
05/15/2025	Update	1
12/01/2024	Update: Housing Move-in Date	1

03

## Live Demonstration:

- How to complete an Annual Assessment
- Overview of updating assessment elements

# Annual Assessments in Reporting



# 04

## APR Report

- APR errors related to Annual Assessments are often caused by the **assessment date, not the answers**.
- Annual Assessments must be dated **within 30 days before or 30 days after the Head of Household's Project Start Date anniversary**. If the date is outside that range, the APR may flag an error even when the information entered is correct.
- Missing Annual Assessments during prior years will also cause an error. **All years must be present** even if they are outside the range of the report.



# APR - Common example

6c - Data Quality: Income and Housing Data Quality					
Data Element	Client Doesn't Know/Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Destination (3.12)	0	0		0	0%
Income and Sources (4.2) at Start	0	0	1	1	6%
Income and Sources (4.2) at Annual Assessment	0	4	1	4	33%
Income and Sources (4.2) at Exit	0	0	0	0	0%

Income is correct, but the Annual Assessment date is wrong → the APR may still show an Income at Annual Assessment error.

# 04

## BusinessObjects Report

- The Annual Assessment Report is available in BusinessObjects and can help users identify Annual Assessment issues before they impact APR reporting.
- The report shows clients who may have missing, due, past due, out of range, or duplicate Annual Assessments. Users can run the report for their project and review the results to determine which client records may need follow-up in HMIS.

### Tabs

**Tab A – HoH Only:** Head of Household records only

**Tab B – All Clients:** All clients in the selected project



Public Folders / chicago\_live\_folder / Chicago CoC Reports (Secure) / Audit Reports /

Title	Type	Last Updated
Archive	Folder	Jan 27, 2023 7:29 AM
Point In Time Count	Folder	Dec 5, 2022 4:53 AM
Annual Assessment Report - 1-28-2025	Web Intelligence	Jan 30, 2025 10:25 AM
Client Case Plans Overview - 12-2025	Web Intelligence	Dec 2, 2025 11:08 AM
Client Release of Information - 3-2026	Web Intelligence	Mar 11, 2026 4:24 PM
Client With a HMID Prior to Enrollment ...	Web Intelligence	Oct 20, 2022 9:19 AM
Head of Household and Client Location...	Web Intelligence	Dec 3, 2023 5:55 AM
Personal ID Crosswalk - 5-2026	Web Intelligence	May 26, 2026 2:55 AM
User Activity Audit - 7-17-25	Web Intelligence	Jul 17, 2025 1:54 PM
Users Last Log In	Web Intelligence	Nov 13, 2023 5:00 AM
Utilization Report - 2-24-2025	Web Intelligence	Sep 6, 2025 6:01 AM

Public Folders → chicago\_live\_folder → Chicago CoC Reports (Secure) → Audit Reports → Annual Assessment Report

# 04

## Emailed Reports

In addition to the Annual Assessment report available in BusinessObjects, some projects also receive an emailed Annual Assessment Reminder Report.

This report is sent as an Excel file and helps identify clients who are coming due for an Annual Assessment during the upcoming month. It is meant to help projects complete assessments within the correct review window before they become overdue.

Report goes out every Monday to ATAs



# Annual Assessments Summary

- Required for all clients enrolled for at least a year
- Recorded in the HMIS 30 days before or after the Head of Household's project anniversary
- Create an Interim Review and Select the "Annual Assessment" in the window
- Use the APR, Business Objects report, and/or the emailed SQL reports to keep track of clients that may have an upcoming or missed AA

