

# HMIS Assessments

HUD requires that certain information (like income, barriers, and health insurance status) be collected for all project participants at specific times, namely, when a participant enters a project, the one-year anniversary of project entry, and when a participant exits a project.

## Why are these assessments needed?

These assessments collect information that HUD uses to evaluate projects and CoC performance. Certain performance metrics, like income growth, are evaluated solely based on the information collected during these assessments. If these assessments are not completed properly you risk not getting credit for the positive outcomes of your project.

	Start/Entry Assessment	Update Assessment (During Program Enrollment)	Annual Assessment	Exit Assessment
<b>Required?</b>	Yes	Optional	Yes	Yes
<b>Who needs it</b>	All household members	All household members	All household members	All household members
<b>When to complete</b>	At project enrollment	When project is notified of major changes, like change in participant's income	From 30 days before enrollment anniversary up to 30 days after enrollment anniversary (see addition notes below)	At project exit
<b>Information collected</b>	<ul style="list-style-type: none"> <li>• Living Situation</li> <li>• Homeless history</li> <li>• Health Insurance</li> <li>• Disabling Condition/Barriers</li> <li>• Domestic Violence</li> <li>• <b>Income</b></li> <li>• Translation Assistance</li> </ul>	<ul style="list-style-type: none"> <li>• Health Insurance</li> <li>• Barriers</li> <li>• Domestic Violence</li> <li>• <b>Income</b></li> </ul>	<ul style="list-style-type: none"> <li>• Health insurance</li> <li>• <b>Income</b></li> </ul>	<ul style="list-style-type: none"> <li>• Exit Date</li> <li>• Exit Destination</li> <li>• Health insurance</li> <li>• Barriers</li> <li>• <b>Income</b></li> </ul>

## Notes on Annual Assessments

The 60-day window in which to complete Annual Assessments is based on the date the participant was **enrolled** in the project, **not** the date the participant was housed. It is the **project's responsibility** to track when Annual Assessments are due.

Annual Assessments should only be completed within the designated 60-day window. If you complete an Annual Assessment outside this timeframe, that information will not be pulled into HUD reports. For example, you would not receive credit for increasing participant's income, even if their income did go up, if you did the assessment outside the timeframe.

Annual Assessments must still be completed even if there was a recent Update Assessment or if the participant exited the project within the 60-day window. For example, if a participant exited your project 25 days after their enrollment anniversary, you would need to complete an Annual Assessment before completing the Exit Assessment.