TX BoS CoC Data Quality Monitoring Guide for CoC Program-funded Projects

1. Background

This document is intended to serve as a guide for CoC Program-funded projects utilizing the TX BoS CoC's Homeless Management Information System (HMIS), ClientTrack, to review HMIS data for quality. This document is not an exhaustive list of HMIS data quality errors and how to fix them, rather, it reflects the most common data quality errors amongst CoC Program recipients in the TX BoS CoC and general guidance for how to identify and correct these errors.

Projects utilizing a HMIS Comparable Database should contact their Comparable Database administrator for assistance on running an Annual Performance Report and making specific data corrections. Guidance specific to ClientTrack may not be applicable to Comparable Database users, however, the data quality errors that occur in HMIS are generally consistent with data quality errors that may occur for Comparable Database users, but the exact process for correcting data quality errors may vary.

The TX BoS CoC recommends that CoC Program-funded projects run and test an APR in HMIS or an HMIS Comparable Database and make necessary corrections no less than quarterly, with a recommended frequency of bimonthly data quality monitoring. Routine oversight of HMIS data quality is critical to the performance of CoC Program-funded projects. Without routine internal monitoring of data quality, some data quality corrections may not be able to be resolved over time.

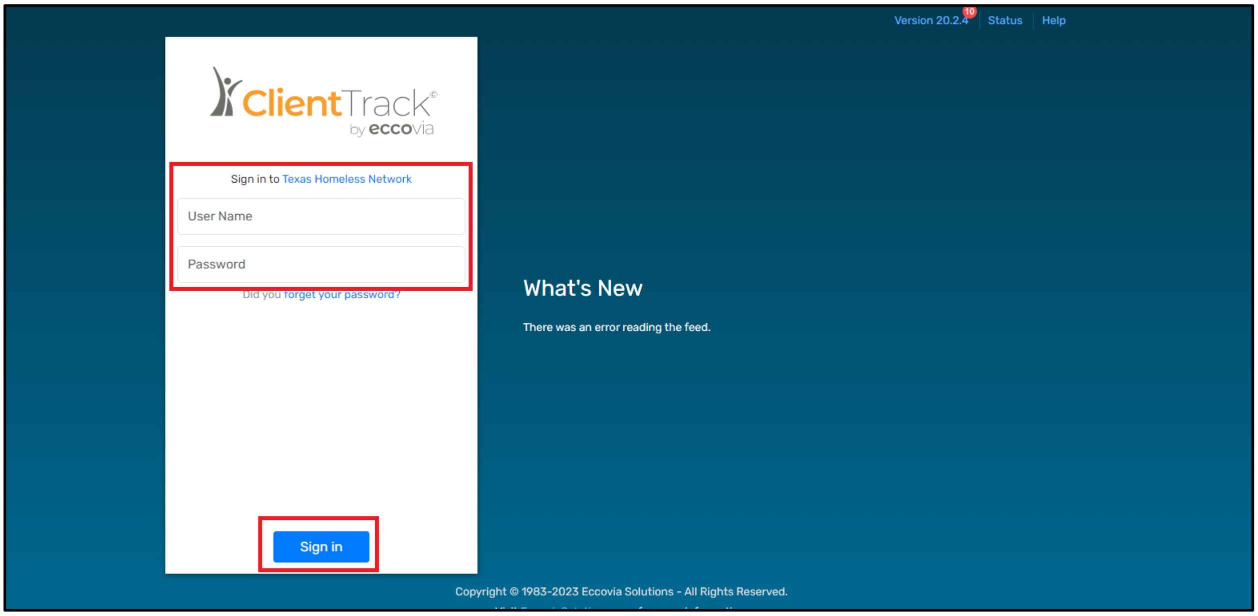
High quality and accurate HMIS data is an essential component of project performance. Incomplete, inaccurate or untimely HMIS data entry is the most common contributing factor amongst low-scoring projects in the TX BoS CoC. Projects should pay special attention to data timeliness, data accuracy, missing Personally Identifiable Information (except Social Security Numbers) and completion of all required Entry, Annual, and Exit Assessments and the required fields within these assessments.

Timely and accurate completion of all required HMIS assessments, and all data fields within these assessments, is imperative to demonstrate performance outcomes such as participant growth in income and noncash benefits, positive exit destinations, and other system performance measures utilized by the TX BoS CoC in the evaluation of CoC Program-funded projects.

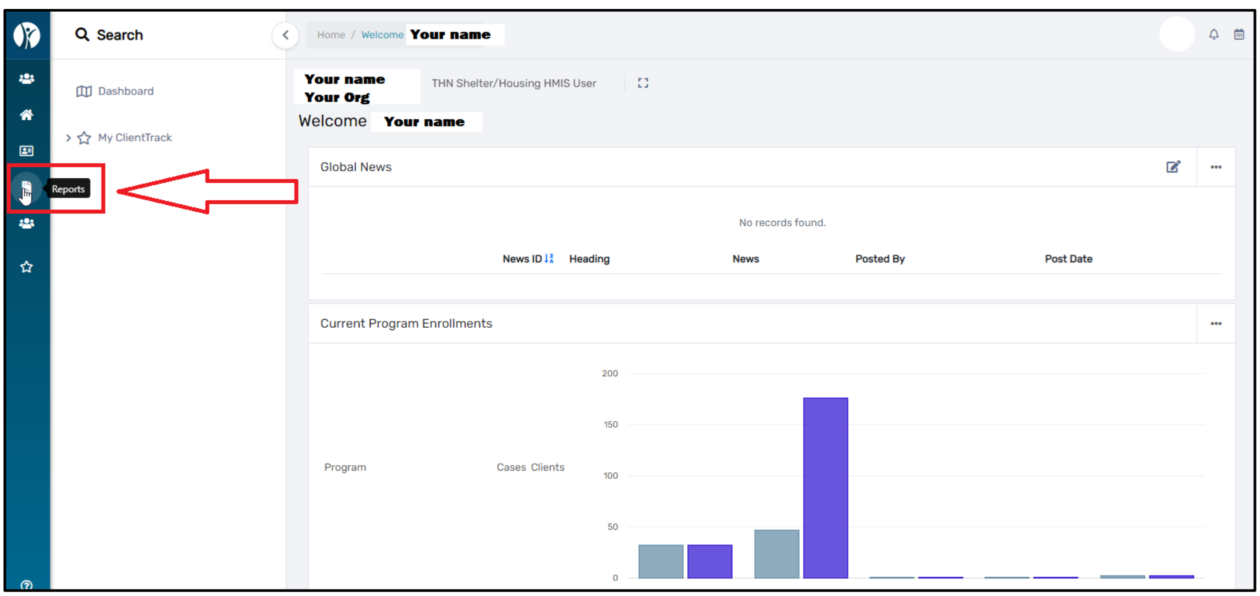
2. Generate the Annual Performance Report (APR) Export in HMIS

The following section contains steps for running the APR Export in HMIS.

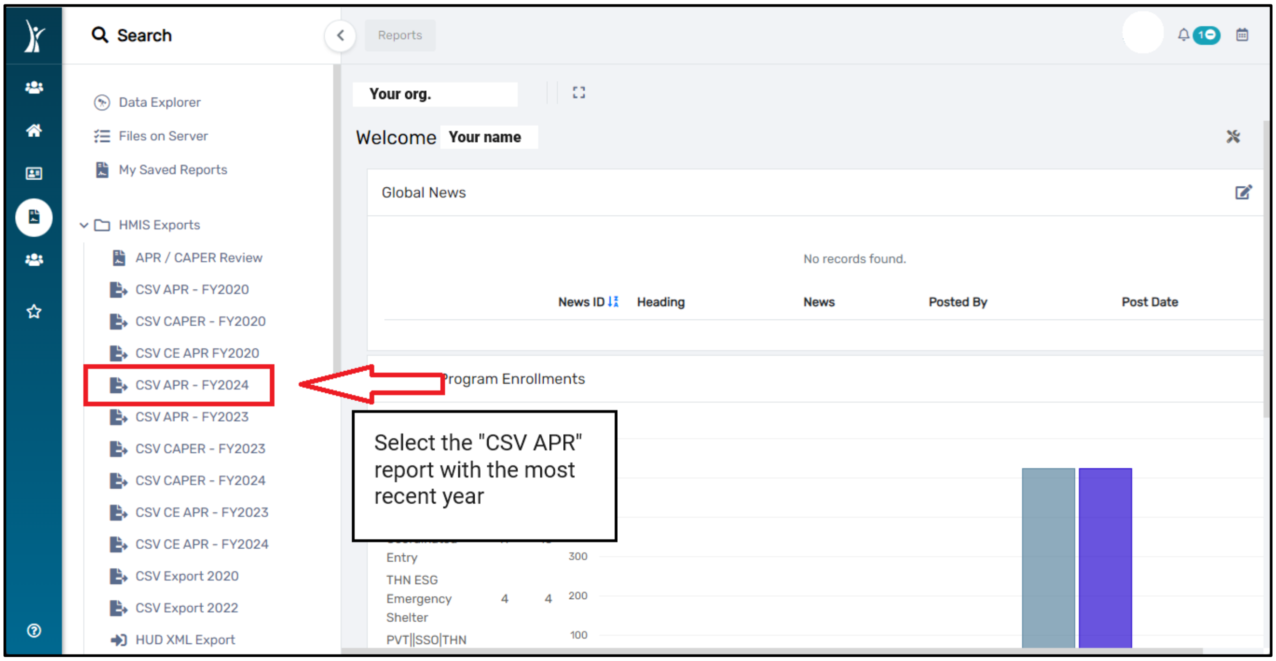
- Login to HMIS - https://clienttrack.eccovia.com/login/TXBOSHMIS

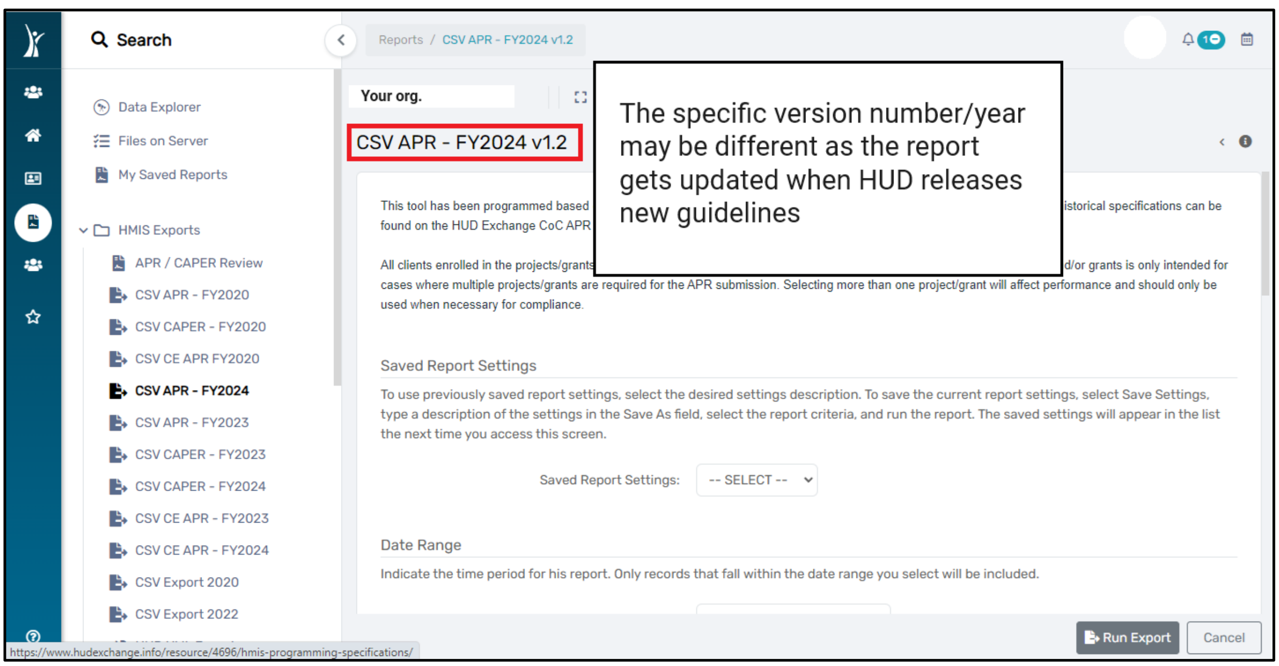


- Select “Reports” from sidebar menu

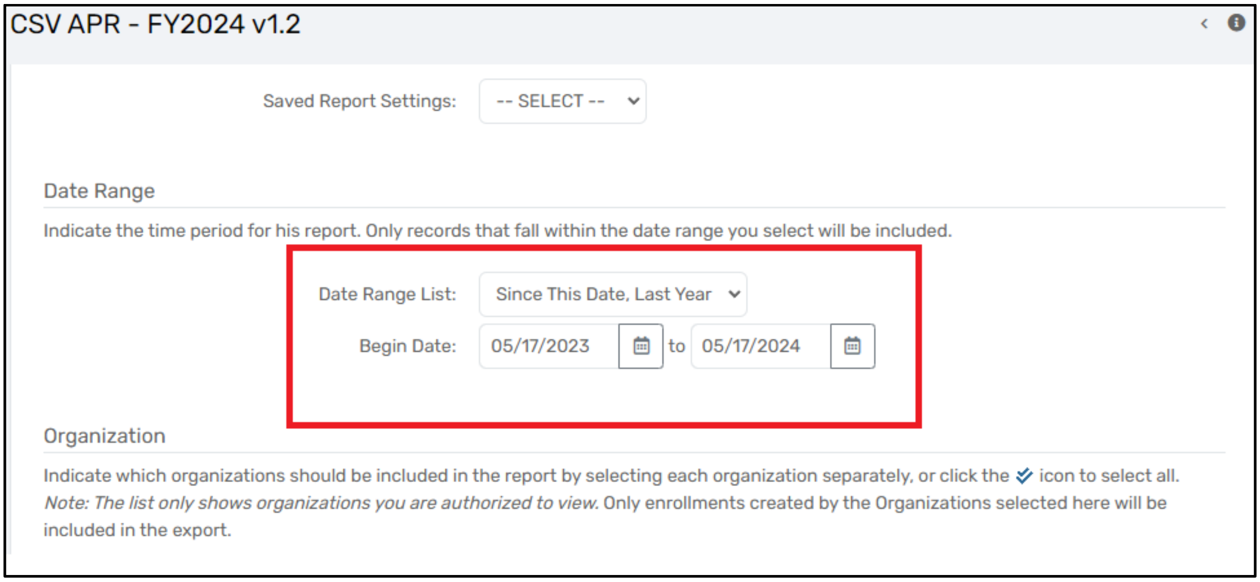


- Select “HMIS Exports” then “CSV APR - 2024”

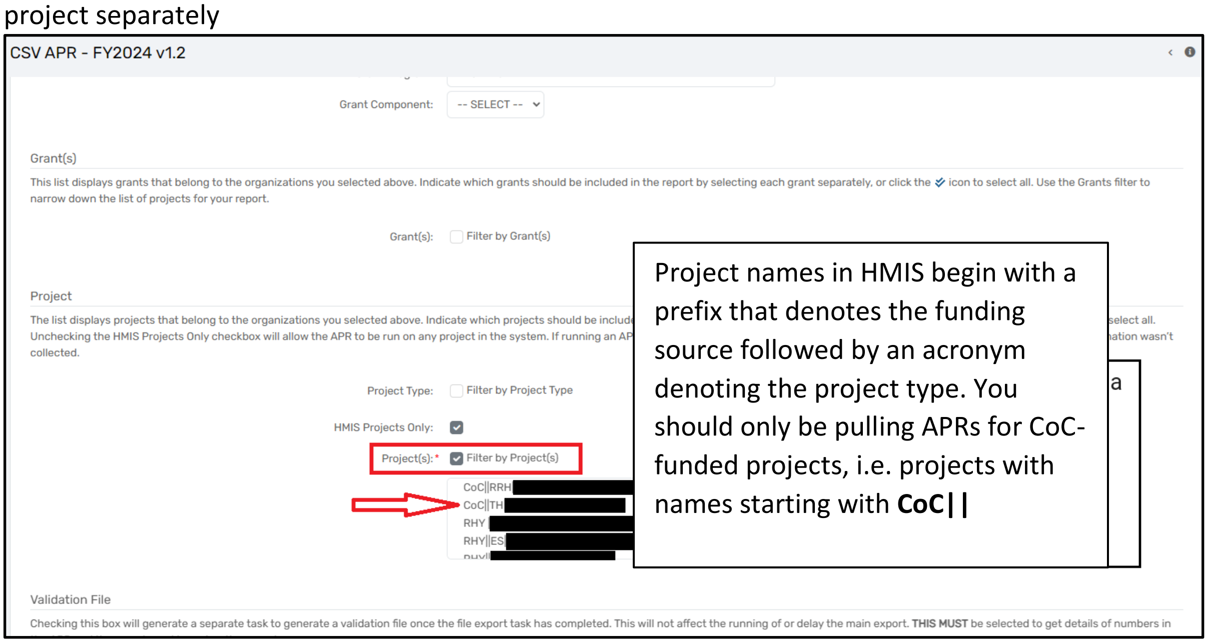




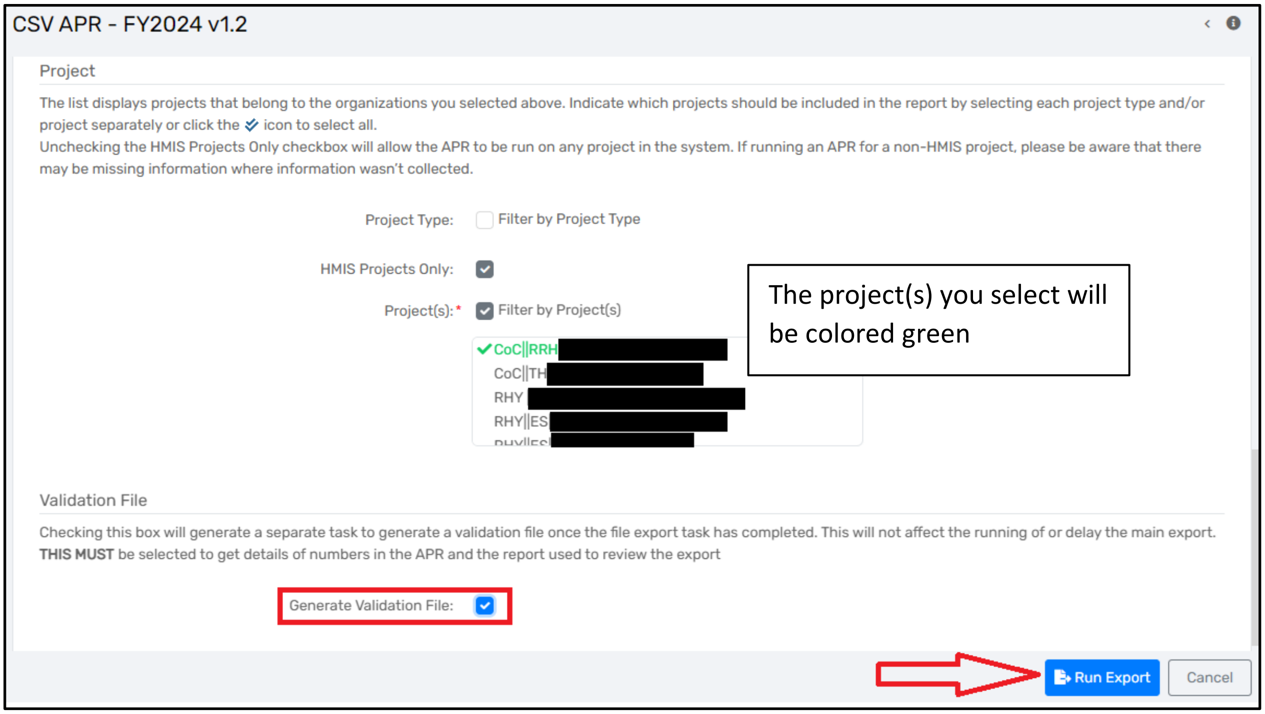
- Select date range
  - If pulling an APR to be submitted in SAGE, make sure the date range matches your projects current grant term.
  - If pulling an APR for internal monitoring purposes, you can use whatever date range is appropriate.



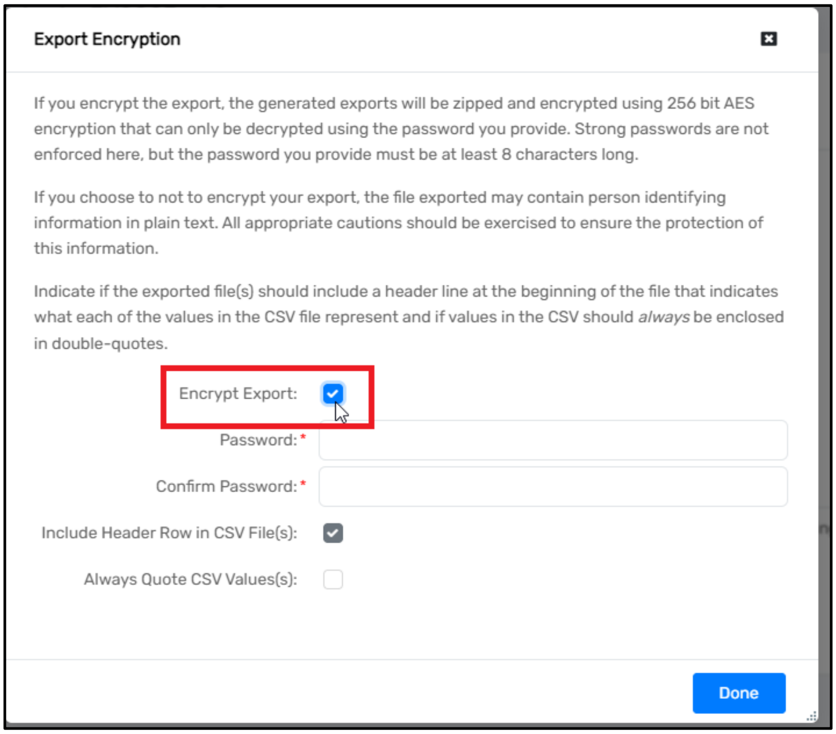
- Select the correct project from "Project(s)" dropdown
  - If it is a Joint component project (TH/RRH), you will need to pull two separate APRs, one for the TH component and one for the RRH component
  - Similarly, if your agency operates multiple CoC-funded projects, you must run APRs for each project separately



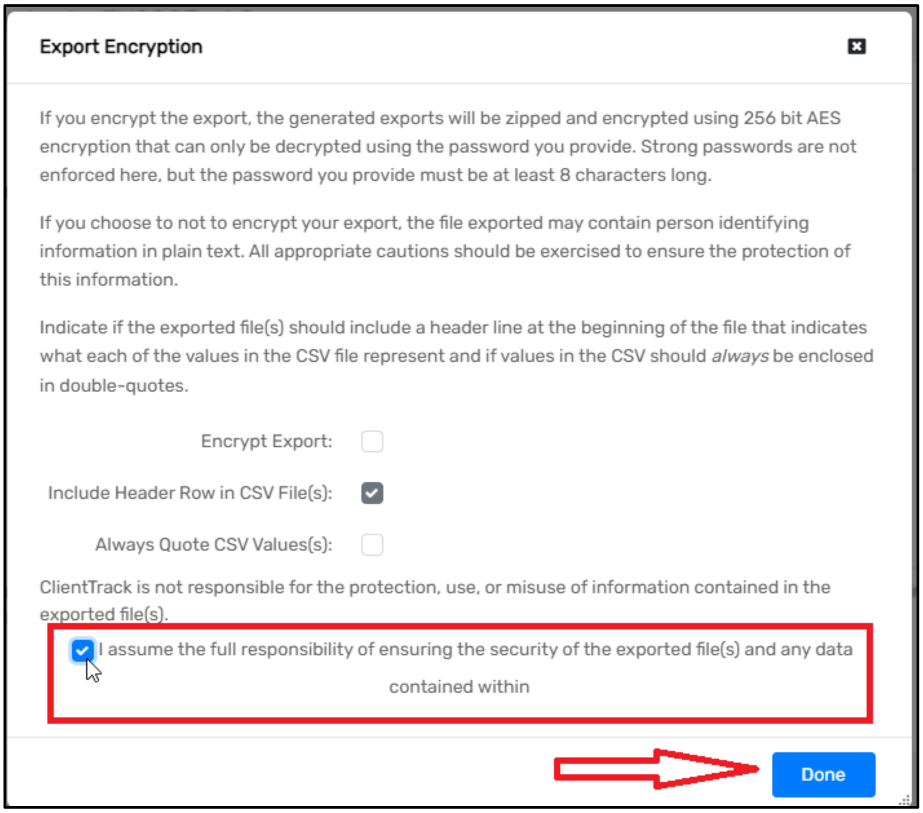
- Make sure the “Generate Validation File” box is checked (the validation files are necessary to correct any issues identified by the APR)
- Click the blue “Run Export” button



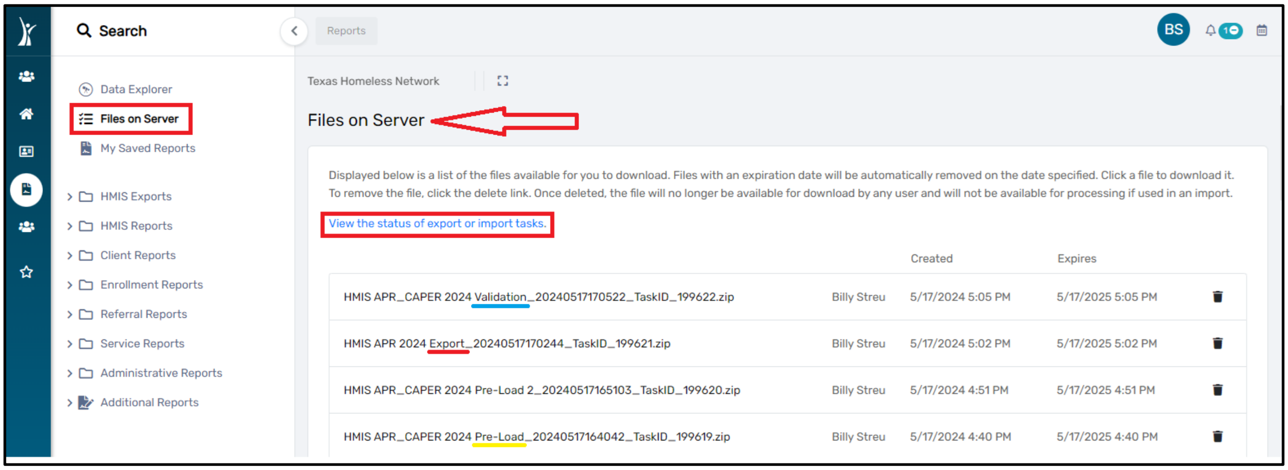
- After clicking “Run Export,” the “Export Encryption” screen will pop up.
- **<u>Uncheck</u> the “Encrypt Export” box.** Please note, projects are responsible for the security of their data outside of HMIS, and must take appropriate precautions to safeguard this information. For more information, visit the [TX BoS CoC HMIS Policies and Procedures (linked)](#).
    - The APR validation files contain Personal Identifiable Information (PII) which should **always** be protected. If you are pulling an APR to use internally (or submit to SAGE), encryption is not necessary.



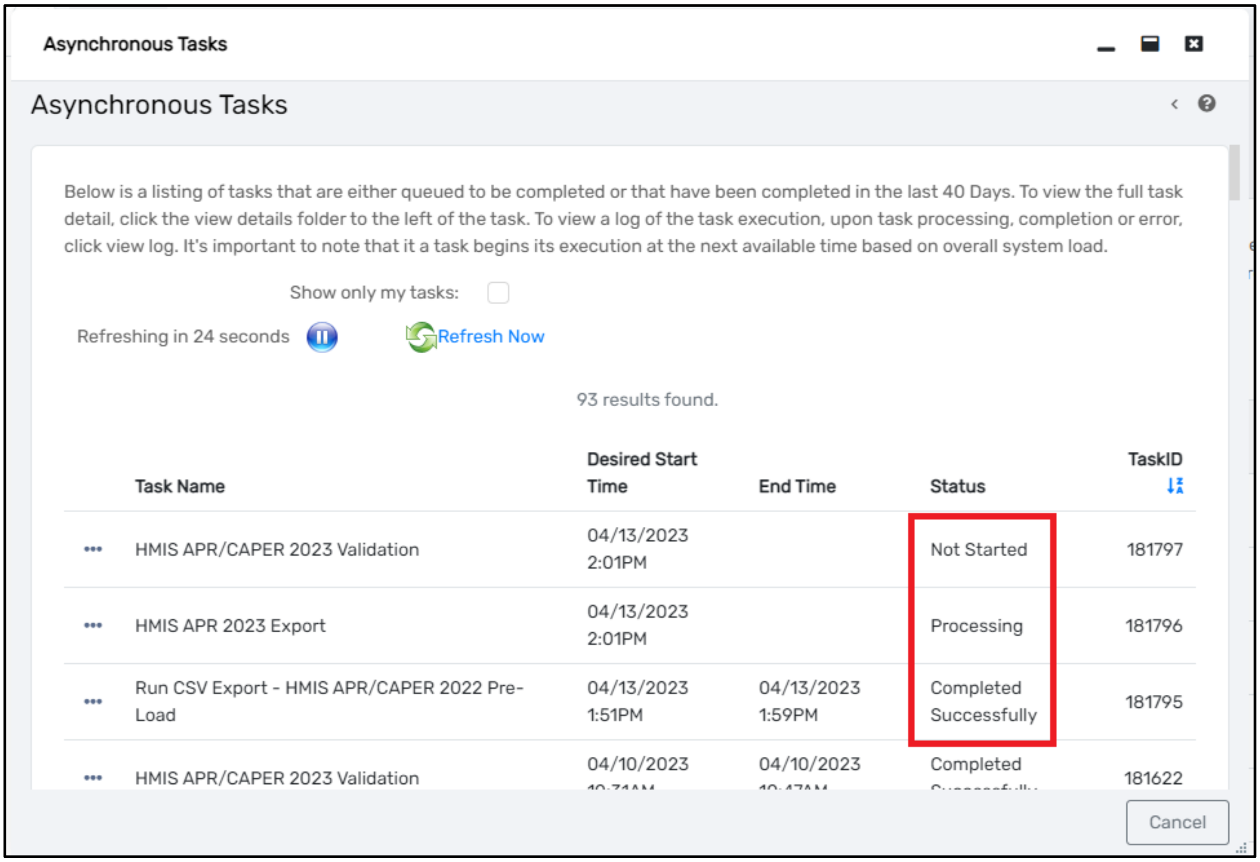
- Once the "Encrypt Export" box is unchecked, a different checkbox will appear near the bottom of the form. Check this box to confirm that you "assume the full responsibility of ensuring the security of the exported file(s) and any data contained within"
- Click the blue "Done" button to run the report



- Once you run the report, navigate to the “Files on Server” page to access the APR. Click on the file name to download the file.
- Every time you run an APR, the system will generate 3 files (or only 2 files if you unchecked “Generate Validation File”)
    - **Export**: the APR file name that contains the word “Export” is the file you will upload to SAGE to generate a readable APR
    - **Validation**: the APR file name that contains the word “Validation” is the file with validation information. You will never upload this file to SAGE (you will get an error if you try). The Validation file is used to help identify and correct any issues with the data
    - **Pre-Load**: the APR file name that contains the word “Pre-Load” is not needed. You generally will not need to download or use this file. Additionally, ClientTrack may generate a Pre-Load 2 file as well
- The APR file names do not contain the agency or project name, just a string of numbers. You can check the date and time when a report was generated to help identify which report is which. The most recently generated reports will be at the top of the list.
    - If you cannot identify a report sitting in your “Files on Server,” there are two ways you can check which project the data belongs to
        - You can test the APR in SAGE (see below) which will show you the name of the agency, project type, and dates included in the report.
        - Check the Q4a.csv file in the APR **Export** zip folder. Column A in this file shows the organization’s name, and Column C lists the project name



- **Reports generated in HMIS will usually take at least 15-30 minutes to run.** If the server is busy, it could take considerably longer.
- You can check the system's progress by clicking the "View the status of export or import tasks" link on the "Files on Server" page. This opens a window titled "Asynchronous Tasks" which shows the status of your reports
    - Completed Successfully: report was run and is ready to download/view
    - Processing: the system is currently working to generate the requested report
    - Not Started: your requested report is in the system queue
- **NOTE**: The APR "Pre-Load" file will be the first task completed by the system. You will not need to use this "Pre-Load" file for anything. Make sure you double check which file you are downloading. The system may also generate a "Pre-Load 2" file that you also will not need to use.

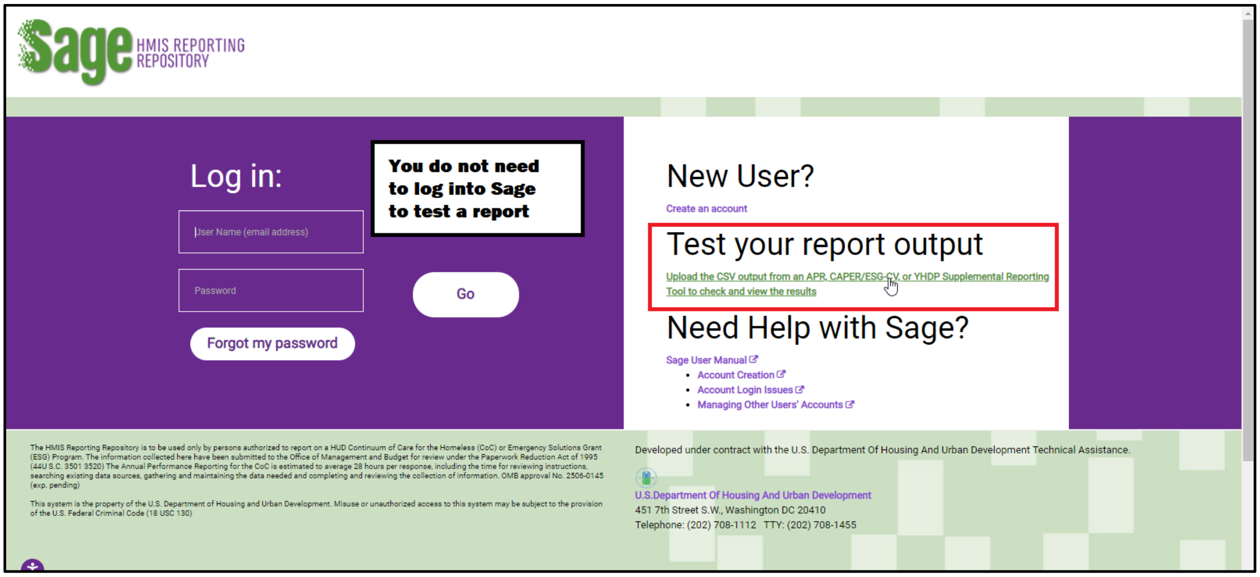


- When you download an APR file from ClientTrack, you will end up with a Zip folder full of CSV files
    - “HMIS APR 2024 **EXPORT**_[string of numbers]_TaskID_[string of numbers].zip” is the zip folder you will use with SAGE. **Do not unzip/extract files from this folder.** Doing so will prompt errors in Sage.
    - “HMIS APR_CAPER 2024 **Validation**_[string of numbers]_TaskID_[string of numbers].zip” contains the validation files. You may need to unzip/extract this folder to access its contents
    - “HMIS APR_CAPER 2024 **Pre-Load**_[string of numbers]_TaskID_[string of numbers].zip” is not used for our purposes.

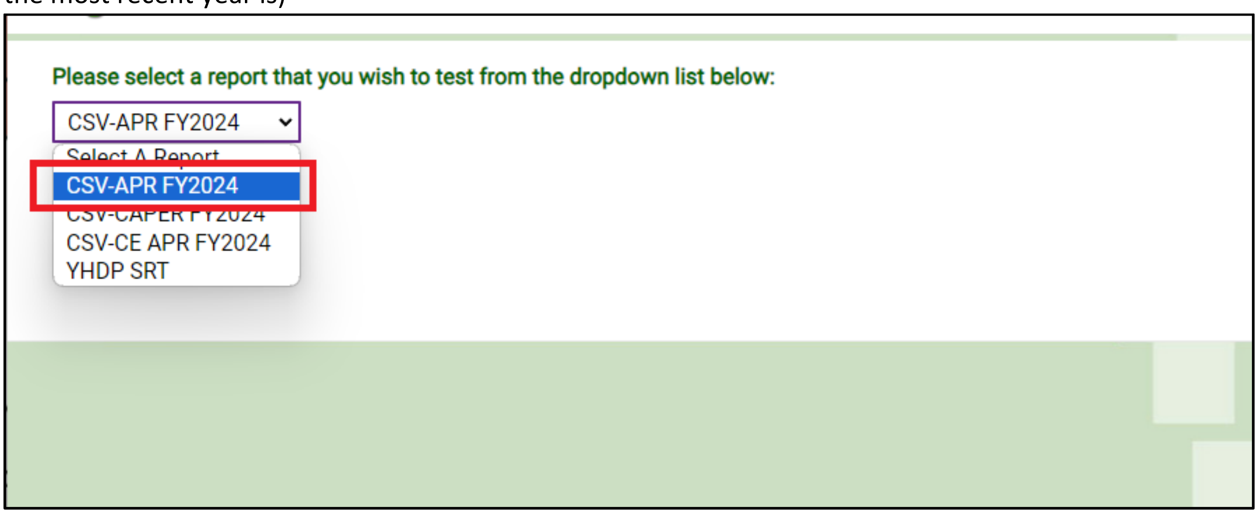
3. Test the HMIS APR Export in Sage

The following section contains steps for how to test the HMIS APR Export in Sage and create a readable report. A Sage account is not required to test this report in Sage.

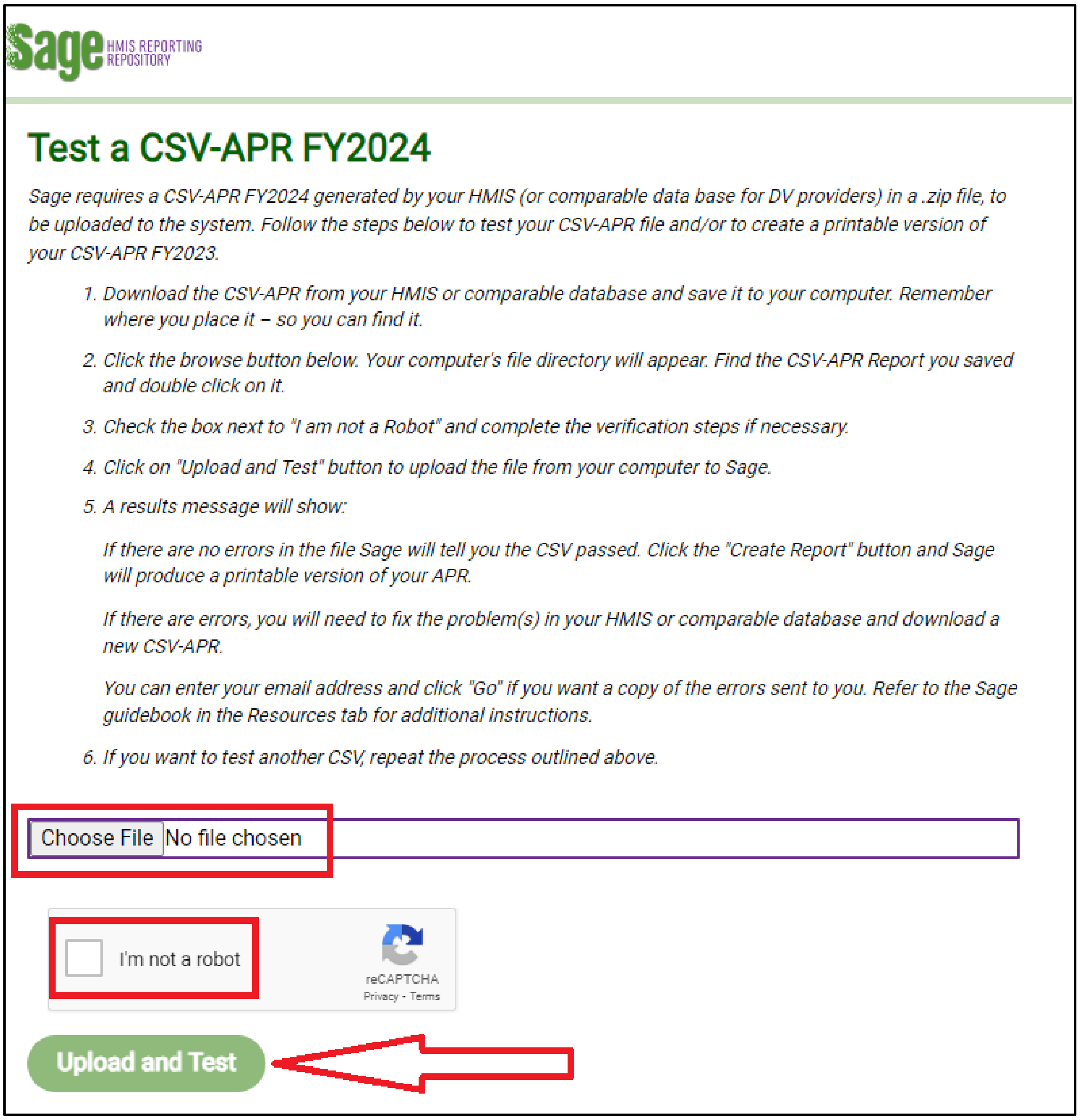
- The APR “export” file downloaded from HMIS needs to be run through Sage to generate a readable report.
- Go to https://www.sagehmis.info/ and click the link for “Test your report output”



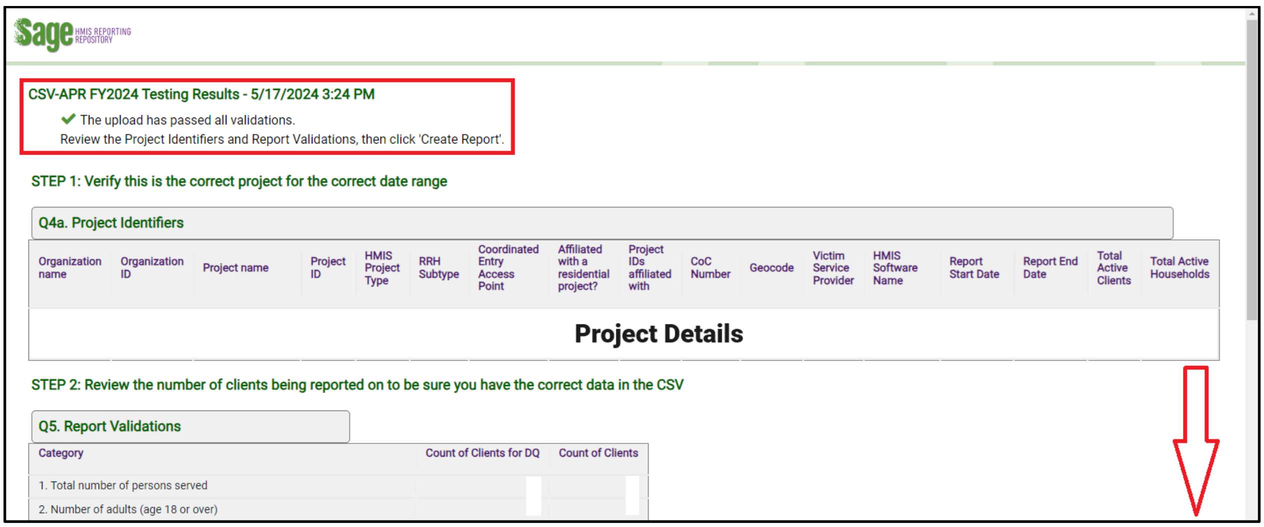
- On the next page, select the type of report from the dropdown menu, “CSV-APR FY2024” (or whatever the most recent year is)



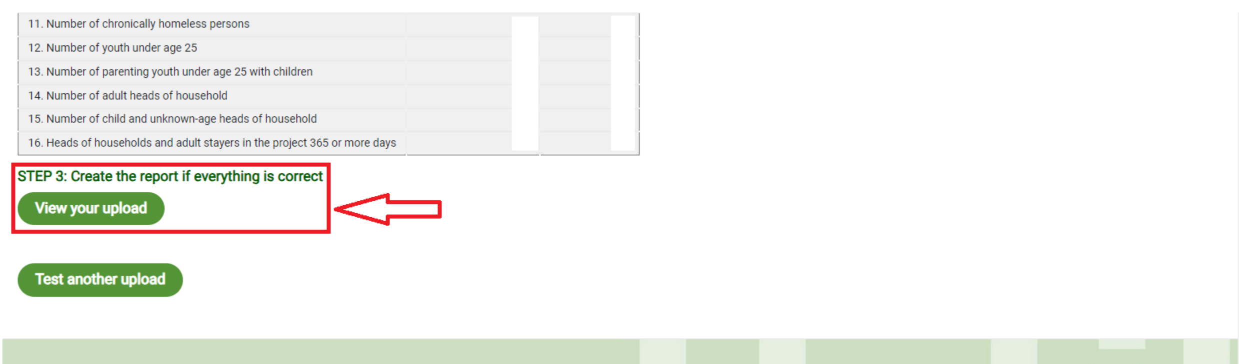
- Upload the APR "export" zip file from your computer, check the "I'm not a robot" box, then click the "Upload and Test" button
  - **NOTE**: only upload the zip file to SAGE. **Do not extract the individual csv files** from the zip folder and try to upload those as it won't work.



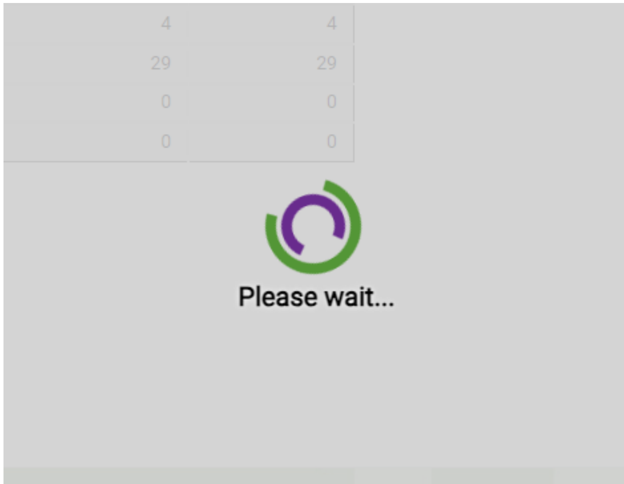
- Check that all the project details are correct
    - Organization name: lists the name of your agency
    - HMIS Project Type: identifies the project component type using HUD's numeric code
        - Transitional Housing = 2
        - Rapid Re-Housing = 13
        - Permanent Supportive Housing = 3 or 10
        - Coordinated Entry = 14
    - CoC Number: should always be **TX-607** for projects operating within the Texas Balance of State Continuum of Care
    - Report Start/End Date: should match the date range you entered in HMIS when pulling the report



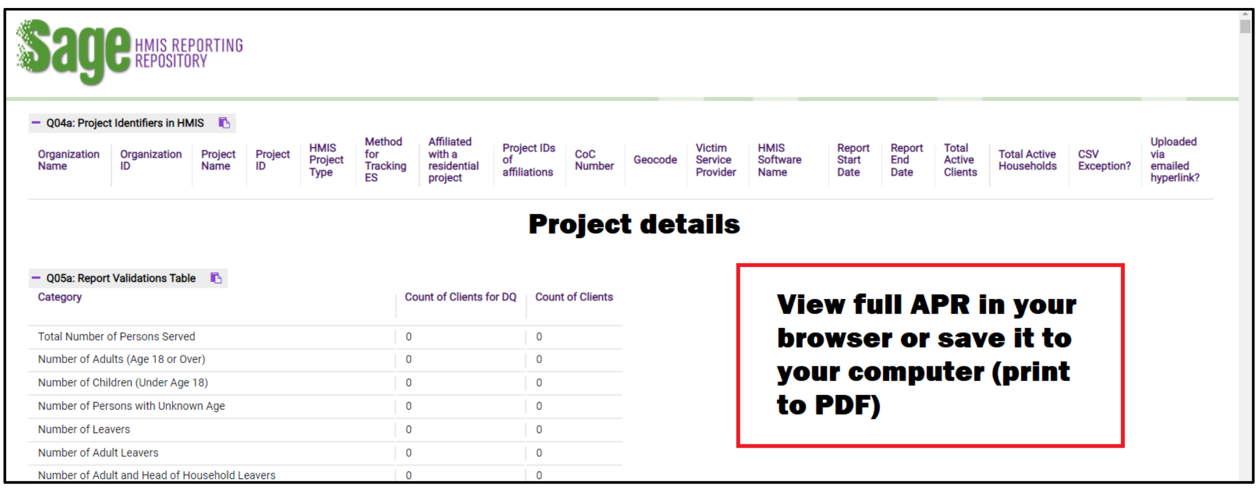
- Scroll down. If all the information appears to be correct, click the "View your upload" button.



- It may take several minutes for the full report to generate.



- View/print the generated report
  - **NOTE**: When submitting your required APR in SAGE after your grant year ends, you will submit the APR “export” zip file, <u>not</u> the readable version generated here. The purpose of testing an APR in SAGE is to create a more easily readable version of the data for your own use.



TEXAS HOMELESS NETWORK

4. Validating HMIS APR Data and Making Corrections

A. Overview

The following section contains guidance for reviewing and validating APR Data using both the readable report generated in Sage and the APR Validation Files produced by HMIS to identify data quality errors.

- The "Validation" zip folder generated by HMIS contains client data that can be used to correct certain errors that appear on an APR.
  - **NOTE**: Unlike the "Export" folder that is put through SAGE to create a readable APR report and only contains aggregate information, the "Validation" folder contains PII and other client-level data. **Never share the "Validation" folder, or any of the csv files contained, without first scrubbing it of all PII**. To remove the PII you should delete the entire column containing PII and save as an Excel Workbook (note: the default save setting is a CSV file.) Hiding the columns or blacking them out does not protect the PII.
- Several of the questions/elements from the APR include measures called "% of Error Rate" and/or "Error Count." For example, element Q06a on the APR looks at whether or not Personally Identifying Information was collected for participants, and you can see the last column for that element is labeled "% of Error Rate." Errors are generally the result of missing required data, and corrective action is required when errors are identified.

Q06a: Data Quality: Personally Identifying Information (PII)

Data Element	Client Doesn't Know/Refused	Information Missing	Data Issues	Total	% of Error Rate
Name	0	0	0	0	*0%*
Social Security Number	0	0	1	1	*3.45%*
Date of Birth	0	0	0	0	*0%*
Race	0	0		0	*0%*
Ethnicity	0	0		0	*0%*
Gender	0	0		0	*0%*
Overall Score				1	*3.45%*

- In the example above, we can see there is a 3.45% error rate (or 1 data issue). Because the APR only shows aggregate data, we can see that there is an error but we cannot readily identify which participant the error is related to. This is where the files in the "Validation" zip folder come in.
  - **NOTE**: Projects in the Texas Balance of State CoC are not penalized for missing Social Security Numbers, however, projects should strive to have a 0% of Error Rate for all the other PII data elements.

B. Validation File Reference Guide

There are 13 csv files located with the "Validation" zip folder. Not all of these files will be helpful for data validation. Below is a list of the Validation files you may need and the APR element they correspond to

- APR_2024_**DQ_2**_Detail.csv: info related to errors for **APR Q06a** (PII), e.g. name, DOB, Race, Gender, Ethnicity
- APR_2024_**DQ_3**_Detail.csv: info related to errors for **APR Q06b** (Universal Data Elements), e.g. Veteran Status, Project Start Date, Relationship to Head of Household, Client Location, Disabling Condition
- APR_2024_**DQ_4**_Detail.csv: info related to errors for **APR Q06c** (Income and Housing Data Quality), e.g. missing financial assessments
- APR_2024_**DQ_5**_Detail.csv: info related to errors for **APR Q06d** (Chronic Homelessness)
- APR_2024_**DQ_6**_Detail.csv: info related to **APR Q06e** (Data Timeliness). These aren't "errors" to be corrected, but can give you an idea about how long it's taking for data to be entered in HMIS
- APR_2024_**Entry**_Detail.csv: info collected at project entry, such a Living Situation prior to program entry. This file can be used to review and verify program eligibility.

C. Locating Data Quality Errors

Q06b: Data Quality: Universal Data Elements

Data Element	Error Count	% of Error Rate
Veteran Status	0	*0%*
Project Start Date	0	*0%*
Relationship to Head of Household	0	*0%*
Client Location	1	*3.45%*
Disabling Condition	1	*3.45%*

Numbers in *green italics* have been recalculated or weighted based on available totals.

- This APR shows there are two errors on Universal Data Elements. One error related to "client location" (prior to project entry) and one error for "disabling condition"
- Since these errors appear on APR Q06b, we will look at the "APR_2024_**DQ_3**_Detail.csv" file in the "Validation" folder.

	A	B	C	D	E
1	Data Element	clientid	Name	DataIssueReason	
2	Client Location (3.7)	111222	Last name, First name	Missing	
3	Disabling Condition (3.8)	333444	Last name, First name	Data Not Collected	
4					
5					
6					
7					

- In the "DQ_3" file, we can see 2 entries, one for each error shown on APR Q06b. This file shows us the name and client ID of the affected participant, as well as the reason for the error.
- We can now log into HMIS, go to the profile for each participant, and correct or enter the missing data.
- **NOTE**: the "Validation" files are stored in the csv, or Comma Separated Values, file format. This file format can only save values and not any formatting. That means, if you do any formatting to the data (like filtering or hiding columns), the csv file will not correctly save those changes and will in fact override the existing data. For example, if you opened a csv file, hid column B, then save and close the document, the next time you open it, everything from column B will be gone forever. **If you need to make any modifications to a csv "Validation" file, you should first re-save the document as a regular Excel file (.xlsx)**

D. Verifying Program Eligibility

CoC Program-funded projects are required to submit an Annual Performance Report in Sage 90 days after the close of an operating grant year. This submission requires recipients to run and download the CSV APR Export from HMIS and upload in Sage, in addition to reporting other key grant information such as financial and performance outcomes.

Beginning June 2, 2024, all Annual Performance Reports in Sage will require recipients to verify the program eligibility of any participant that had a Living Situation other than a 'Homeless Situation' immediately prior to project enrollment. This process is satisfied through completing Sage's "Program Eligibility" form within the Annual Performance Report submission.

back

Program Eligibility

Date 5/28/2024

HELP

This information is from Q15 – Living Situation in the uploaded CSV. This is data collected at project entry indicating where the person was staying prior to entering the project and is used by HUD to assist in the determination that persons assisted by this project are homeless as defined by HUD. For all persons coming from situations other than Homeless situations or Institutional situations, an explanation of how eligibility was determined and documented by this project must be provided in the text box(es) below. If all persons entered from a Homeless or Institutional Situation, no further information is required. Click Save to return to Launchpad and continue report submission. **If you re-upload your APR CSV, you must then EDIT the Program Eligibility form, review the new data, edit comments as necessary, and then click SAVE for the data to be updated on the form.**

Living Situation	Total Persons	Response Option	Status	How was eligibility determined/documented by this project
Homeless Situation	22	All	These persons are all assumed eligible.	
Institutional Situation	0	All	These persons are eligible if they entered the institution homeless and exited within 90 days.	
Temporary Situation (Transitional Housing)	3	Transitional Housing for homeless persons	Eligibility must be explained.	
Temporary Situation (Other)	5	Other Temporary Situations including residential project without homeless criteria, hotel/motel paid for without emergency shelter voucher, host home, staying/living temporarily with family or friends.	Eligibility must be explained.	
Permanent Situation	4	Permanent Situations include rental by client with or without a housing subsidy and owned by client without housing subsidy.	Eligibility must be explained.	

Information in the "Program Eligibility" form will be auto-populated from the information provided in the CSV APR Upload section of the Annual Performance Report, and will only include the number of persons in each Living Situation, not the names or HMIS IDs of participants that require verification of program eligibility. As a result, this form may require recipients to perform an analysis of their HMIS data to verify program eligibility of participants served during the reporting period by reviewing the Validation Files associated with the CSV APR Export.

To verify program eligibility, recipients should download the Validation zip folder from HMIS that was automatically generated with the CSV APR Export, and review the Validation File labeled "APR_2024_Entry_Detail."

Column F of the Entry Detail Validation file, 'Prior Residence, 'indicates a participants living situation immediately prior to program enrollment. Column A, 'Client ID," indicates the HMIS Client ID

A	B	C	D	E	F	
clientid	Relationsl	enrollid	Enrollmer	Disabling	PriorResidence	Pri
111111	Self (1) (Sl	11111	#########	Yes (1)	Transitional housing for homeless persons	
222222	Self (1) (Sl	22222	#########	Yes (1)	Transitional housing for homeless persons	
333333	Self (1) (Sl	33333	#########	Yes (1)	Place not meant for habitation (116)	Cai
444444	Self (1) (Sl	44444	#########	Yes (1)	Place not meant for habitation (116)	

5. Common Data Quality Errors and How to Correct Them

The following section and subsections contain common data quality errors and how to correct them. This is not an exhaustive list of data quality errors and corrections. Projects are encouraged to routinely review all APR data and seek clarification and guidance from THN as needed.

A. APR Q06c: Data Quality: Income and Housing Quality Data

APR Q06c corresponds to Income and Housing Data Quality outcomes in the readable Sage APR report. This APR field is associated with the Validation File “APR_2024_DQ4.” Meaning, to identify the participants producing an Income and Housing Data Quality in this table, projects should review Validation File APR_2024_DQ4 to identify the participants who are missing an assessment or assessment data.

Q06c: Data Quality: Income and Housing Data Quality

Data Element	Client Doesn't Know/Prefers Not to Answer	Information Missing	Data Issues	Total	% of Error Rate
Destination	0	0	0	0	0%
Income and Sources at Start	0	1	0	1	2.94%
Income and Sources at Annual Assessment	0	2	0	2	20.00%
Income and Sources at Exit	0	1	0	1	10.00%

Validation File “APR_2024_DQ_4” will indicate the Data Element producing an error, the HMIS client ID, the Enrollment Data and Exit Date (if applicable), and the Cause of the Issue. Projects should pay special attention to the Data Element and Cause of Issue fields to identify data quality errors and make necessary corrections.

Data Element	ClientID	CauseOfIssue
Income and Sources (4.2) at Start	111111	
Income and Sources (4.2) at Start	222222	Information Missing - Information Date Not same as Project Enry Date
Income and Sources (4.2) at Start	333333	Information Missing - No Assessment Taken
Income and Sources (4.2) at Start	444444	Information Missing - Income form Any Source Data Not Collected
Income and Sources (4.2) at Annual Assessment	555555	Information Missing - Income form Any Source Not Collected
Income and Sources (4.2) at Exit	666666	Information Missing - Information Date Not same as Project Exit Date

Sections i-iii below outline common Data Errors associated with the Data Elements within APR Q06C.

i. Data Error (Cause of Issue): “Information Date Not same as Project Entry Date”

This error occurs when the participant’s Entry Assessment, or any sub-assessment within the Entry Assessment (i.e. the Financial Assessment), has a date other than the participant’s CoC Project Enrollment Date.

If at first glance it looks like the Entry Assessment date matches the Enrollment Date, it's likely that there is a different date listed in one of the sub-assessments. Changing the main assessment date does not always change the date on the sub-assessments.

To correct, make note of the participant’s Project Start Date. Then, edit the participant’s Project Entry Workflow and update all dates as needed to match the Project Start Date, then save. See section 4.C., “Editing the Entry Assessment” for additional instructions.

ii. Data Error (Cause of Issue): “Information Missing - Information Date Not same as Project Exit Date”

This error occurs when the participant’s Exit Assessment, or a sub-assessment within the Exit Assessment (i.e. the Financial Assessment), has a date other than the participant’s CoC Project Exit Date.

To correct, make note of the participant’s Project Exit date. Then, edit the participant’s Project Exit Workflow and update all dates as needed to match the Project Exit Date, then save. See section 5.D., “Editing the Exit Assessment” for additional details.

iii. Data Error (Cause of Issue): “Information Missing - Income form Any Source Not Collected”

This error occurs when income information was not collected during the Entry Assessment, Annual Assessment, or Exit Assessment, or when any one of these assessments were not completed or were completed outside of the appropriate time frame. To correct, review Validation File DQ4’s “Data Element'' column to identify if this information was missing at Start, Annual, or Exit, and follow the relevant instructions below based on assessment type.

a. Data Element: Income and Sources at Annual Assessment:

Data Errors within this Data Element can occur for any of the below reasons:

- When an Annual Assessment was not completed
- When an Annual Assessment was completed outside of the required time frame.
    - Annual Assessments must be completed 30 days before or 30 days after the Head of Household’s *Enrollment Anniversary***.**
    - A common error is completing the Annual Assessment based on the Head of Household’s Housing Move-In Date, however, Annual Assessment dates should always be completed based on the *Enrollment Date*.
    - Another common error is completing the Annual Assessment as a During Program Enrollment Assessment. Completing a During Program Enrollment Assessment will not satisfy the Annual Assessment requirement, and will result in missing Annual Assessments.
- When the Annual Assessment was completed but Income information was not collected. To correct, create an Annual Assessment and backdate to the appropriate window based on available information in the client file and/or discuss with the client. See section 5.B., “Creating an Annual Assessment” section for instructions.
- When a Participant has an Annual Assessment due. As soon as the participant enters the 60-day window to complete the Annual Assessment, the assessment will populate as a missing annual assessment.

b. Data Element: Income and Sources at Start

Data Errors within this Data Element can occur for any of the below reasons:

- Income information was not collected during the Entry Assessment
    - To correct, edit the Project Entry Workflow and update add the Financial Assessment within the Entry Assessment with relevant financial and income information, if known. Information entered *must* reflect the participant's income at the time of Project Entry. Be mindful of dates entered when making this correction; all dates must match the Entry Assessment, and the Entry Assessment must match the Project Enrollment Date to avoid additional data quality errors.
- The financial assessment within the Entry Assessment does not match the Project Enrollment Date
    - To correct, edit the Project Entry Workflow and update the date in Financial Assessment within the Entry Assessment and save. The date in the Financial Assessment subassessment must match the Enrollment Date.

c. Data Element: Income and Sources at Exit

Data Errors within this Data Element can occur for any of the below reasons:

- An Exit Assessment was not completed
    - The ability to correct this error varies by participant. Factors to consider include: whether the necessary information to report in the Exit Assessment is available in the participant's physical file or another database, and if not, the project's ability to collect this information post-Project Exit. Depending on the nature of the exit or the length of time since exit, it may not not be appropriate or feasible to collect this information from the participant after Exit. Projects should assess the ability and appropriateness of collecting this information after Exit and proceed accordingly.
    - If the project is able to obtain this information without causing potential harm to the participant, this error can be corrected by editing the Exit Workflow and entering the necessary information. The dates in the Exit Assessment and all sub assessments (i.e. Financial Assessment) must match the Project Exit Date to avoid additional data quality errors.
- Income information was not collected during the Exit Assessment
    - The ability to correct this error varies by participant. Factors to consider include: whether the necessary information to report in the Financial Assessment is available in the participant's physical file or another database, and if not, the project's ability to collect this information post-Project Exit. Depending on the nature of the exit or the length of time since exit, it may not not be appropriate or feasible to collect this information from the participant after Exit. Projects should assess the ability and appropriateness of collecting this information after Exit and proceed accordingly.
    - If the project is able to obtain this information without causing potential harm to the participant, this error can be corrected by editing the Exit Workflow and entering the

necessary information into the Financial Assessment. The dates in the Financial Assessment must match the date in the Exit Assessment, and the Exit Assessment date must match the Project Exit Date to avoid additional data quality errors.

- The Financial Assessment date within the Exit Assessment does not match the Project Exit Date
    - To correct, edit the Exit Workflow and update the Financial Assessment date to match the Exit Assessment. These dates must match the Project Exit Date to avoid additional data quality errors.

d. Data Element: Destination

Data Errors within this Data Element generally occurs in the following circumstances:

- An Exit Assessment was not completed.
    - To correct, edit the Exit Workflow and create an Exit Assessment ONLY IF the project has access to the data that is required to be entered. If the project does not have access to this information in the participant file and is unable to obtain it from the exited participant, this error cannot be resolved.
        - If the information was not collected prior to Exit, the project should consider the appropriateness of contacting the Exited participant to obtain this data post-Project Exit. In order to determine the appropriateness of collecting this data post-Project Exit, projects should consider the nature of the exit and whether initiating contact after Project Exit will cause potential harm to the participant. Projects should avoid contacting the participant after Exit if it may cause potential to harm to the participant.
    - If the project does have access to the necessary information or is able to collect it, the Exit Assessment date MUST match the Project Exit Date to resolve this error
- An Exit Assessment was completed, but the participant's Exit Destination was not recorded in the Exit Assessment.
    - To correct, edit Exit Workflow and create an Exit Assessment ONLY IF the project has access to the data that is required to be entered, or has the ability to collect it without causing harm to the participant. Projects should not assume the Exit Destination for any participant.

B. Creating an Annual Assessment

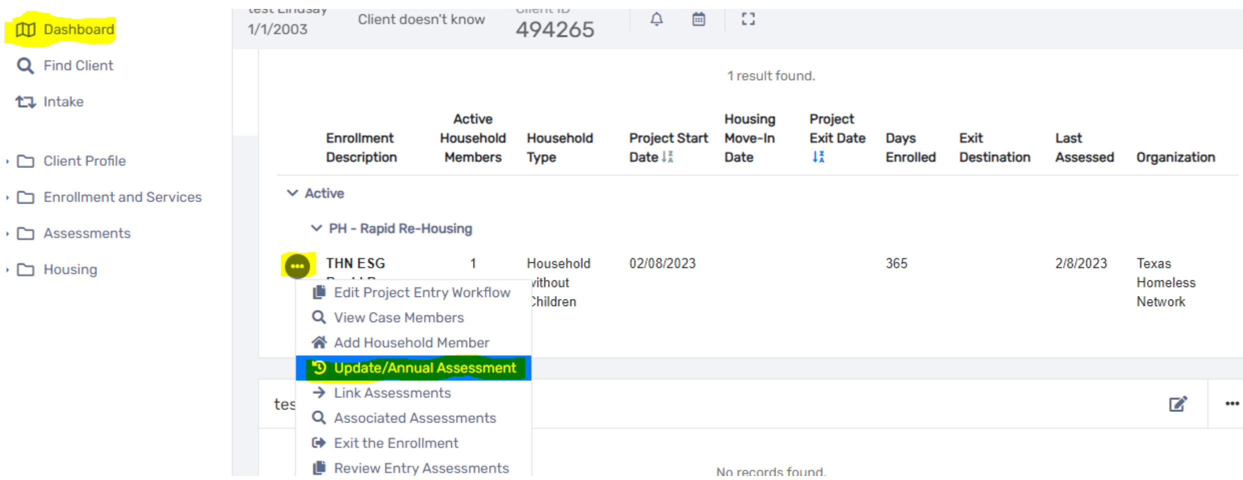
Considerations

It is **very important** that you choose “**Annual Assessment**” when completing this. “During Program Enrollment” assessments will **not** be picked up in reporting, and cannot be used in place of an Annual Assessment. THN is unable to change a During Program Enrollment assessment to an Annual Assessment after it’s completed, and a brand new annual assessment will need to be completed using the correct dates if the assessment was completed, but done as a "During Program Enrollment" rather than an "Annual Assessment.”

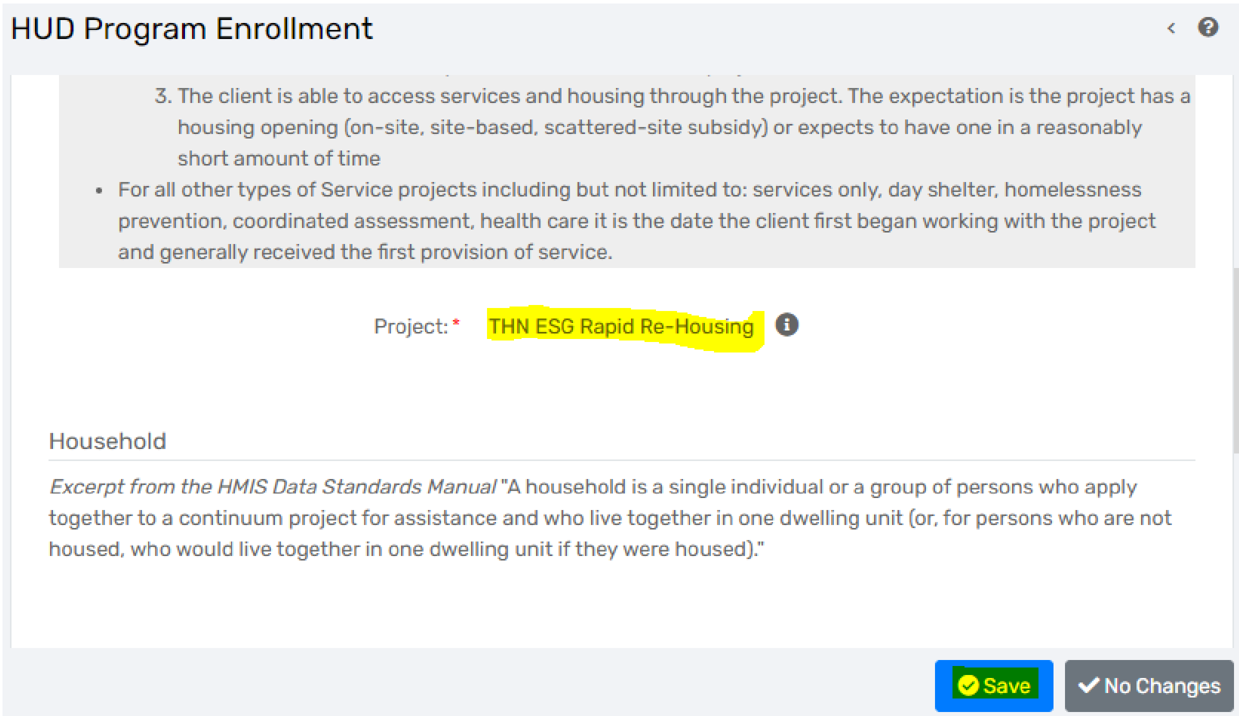
It is also important that the Annual Assessment be completed during the time range **30 days prior** to **30 days after the HOH enrollment date anniversary (*no*t the Housing Move-In Date)**. If it is done outside of this time range (even if it is done earlier), it will not be picked up in reporting and it will show as a missing annual assessment.

<u>Instructions</u>

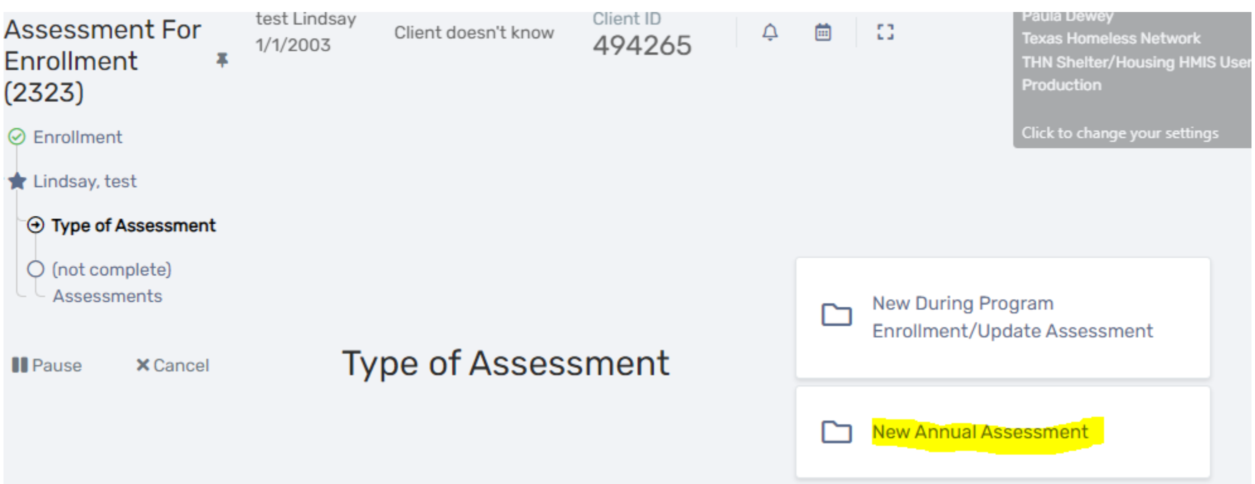
To create an Annual Assessment, first go to the client dashboard and locate the enrollment for the client. Then click the action button to the left of the enrollment and select “Update/Annual Assessment”.



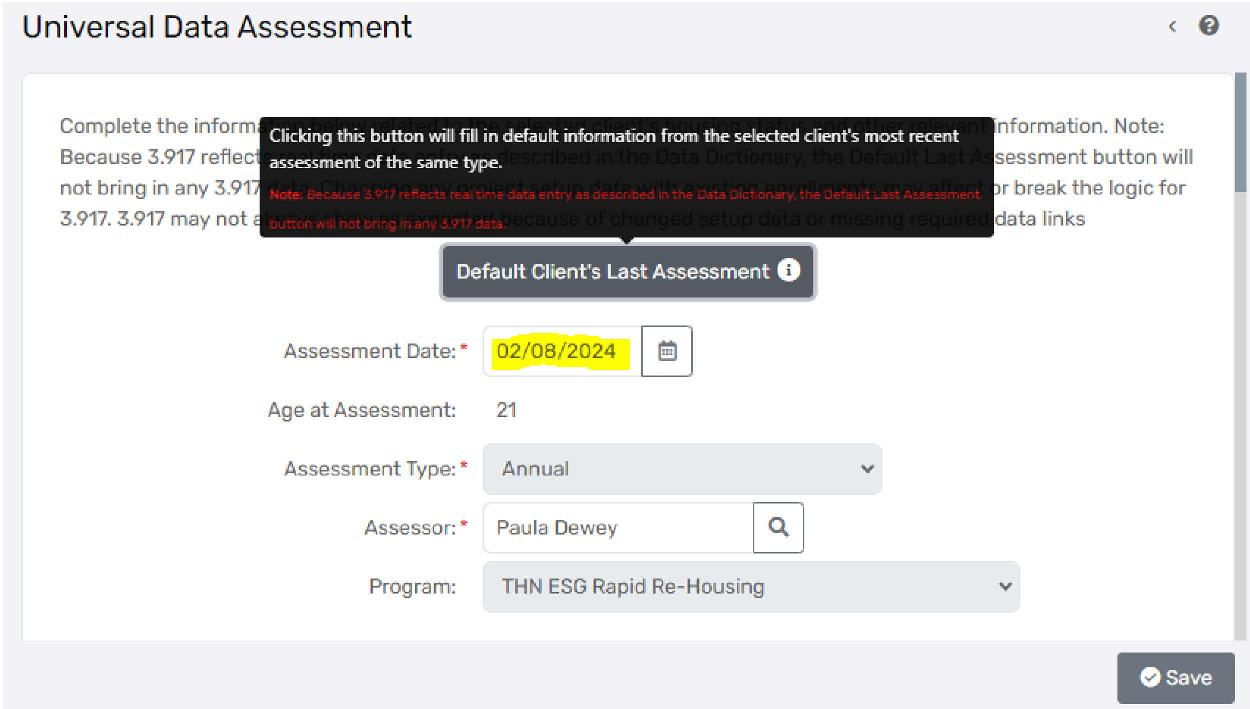
You will be taken to the HUD program enrollment page where you can verify you are on the correct project, then click Save.



After clicking save it is **very important** that you select “New Annual Assessment” on the next page.

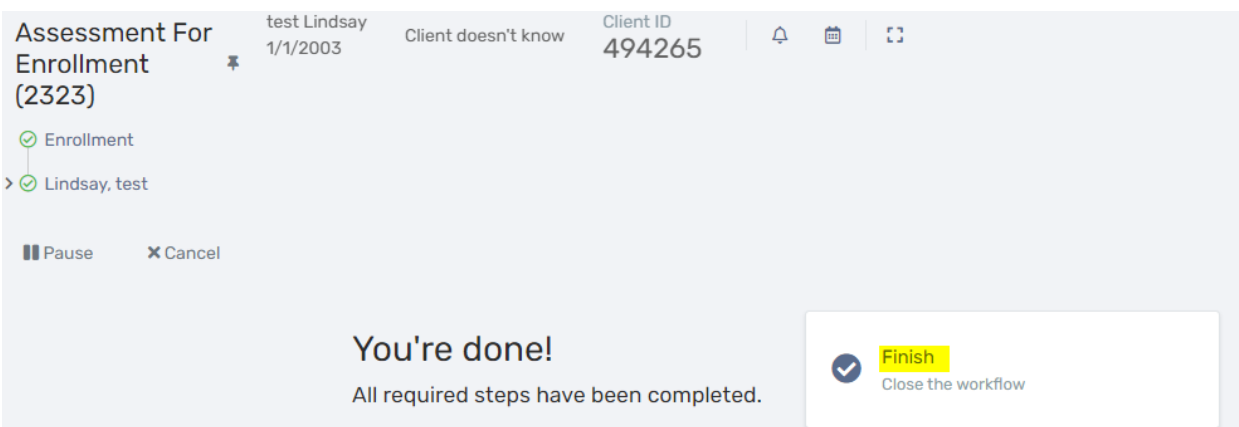


The next page will have the assessment date, make sure to enter the correct date here (has to be within 30 days before to 30 days after the Head of Households enrollment date.

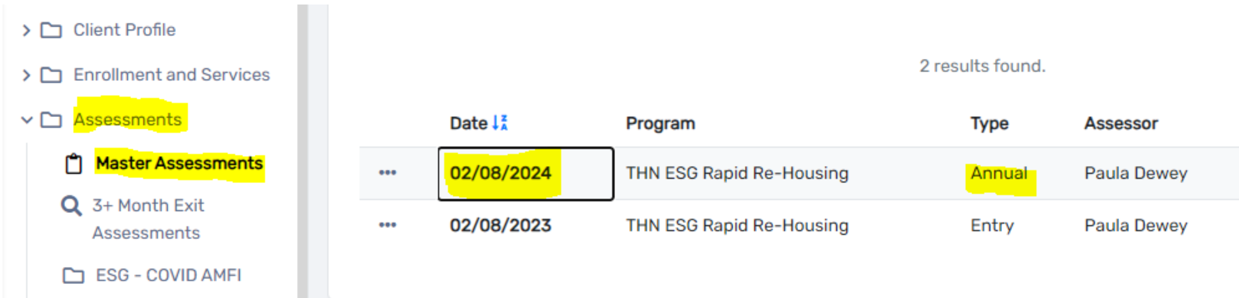


Fill out the remaining date on each page and click save or save and close on each page. Make sure that the date is consistent on every page of the assessment before you save.

Once you have completed all pages of the enrollment you will see a page that says "You're done!". You can click the finish button here and you will have a completed annual assessment.



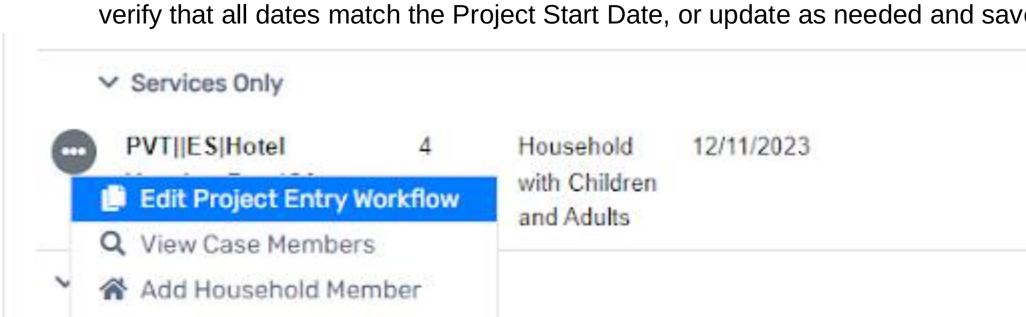
If you go to the Assessments menu and click on "Master Assessments" you should now see your annual assessments where you can verify that the date is correct, and that you see a Type of Annual.



C. Editing the Entry Assessment

The following steps outline the process for editing an Entry Assessment:

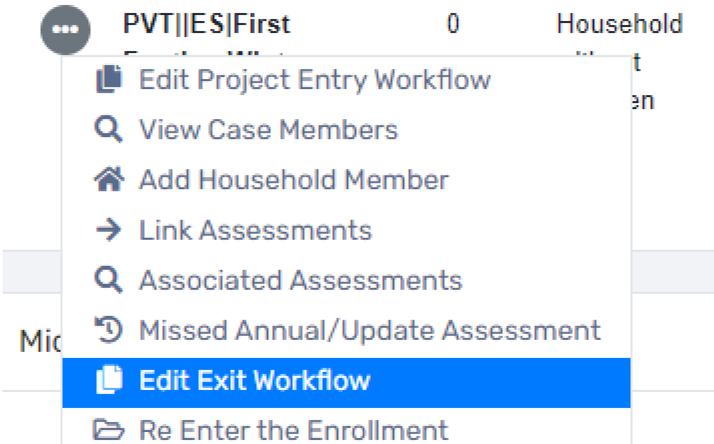
- Navigate to the participant's CoC Project Enrollment
- Click the blue action button next to the enrollment and select "Edit Project Entry Workflow (picture below)
- Click through each page of the Entry Assessment Workflow and enter any missing data, and verify that all dates match the Project Start Date, or update as needed and save.



D. Editing the Exit Assessment

The following steps outline the process for editing an Exit Assessment:

- Navigate to the participant's CoC Project Enrollment
- Click the blue action button next to the enrollment and select "Edit Exit Workflow (picture below).
- Click through each page of the Exit Assessment Workflow and enter any missing data as appropriate, and verify that each date matches the Project Exit Date, or update as needed and save.


PVT||ES|First
0
Household
Edit Project Entry Workflow
View Case Members
Add Household Member
Link Assessments
Associated Assessments
Missed Annual/Update Assessment
Edit Exit Workflow
Re Enter the Enrollment