



Annual Assessment

Annual Assessment

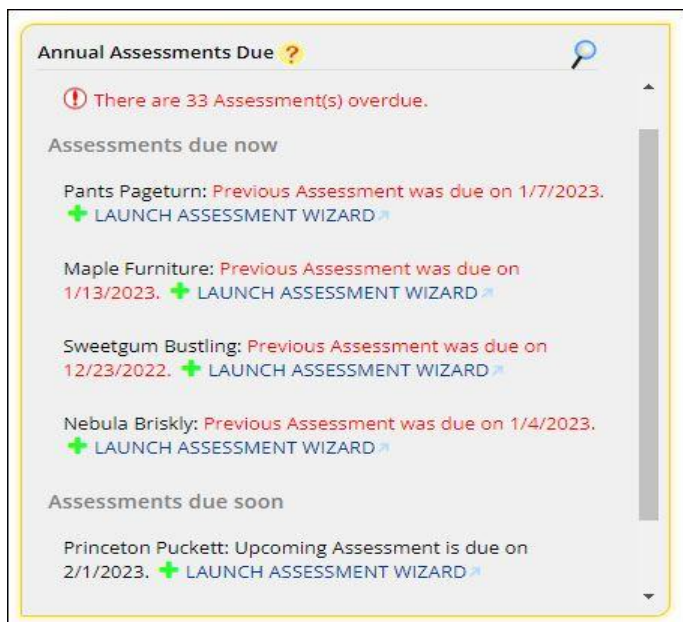
Annual Assessments: Data collection must include an annual assessment for all persons in the project one year or more. Data elements required for collection at annual assessment must be entered with an Information Date of no more than 30 days before or after the one-year anniversary of the head of household's Project Start Date, regardless of the date of the most recent 'update' or any other 'annual assessment'.

Annual Assessment Due section of the project dashboard





Larger image of Annual Assessments Due section:



Click of the magnifying glass icon it the top right of the box to launch the Admin - Annual Assessments Due Report. This report lists clients with Annual Assessments due Now, Soon or Past Due.



Admin - Annual Assessments Due

Lists clients with Annual Assessments due in the near future or which are past due.

Your previous runs of this report

Report criteria: choose your filters for this report run

Projects

(1 selected)

Filter by CoC ☒ MA-500 - Boston CoC ☒ MA-502 - Lynn CoC ☒ MA-503 - Cape Cod Islands CoC

Filter by text

SMOC - CSPCH Omits MetroWest

SMOC - EA Church Street Shelter Hudson

SMOC - EA Gordon Street Shelter Framingham

SMOC - EA Medway House

SMOC - EA Pathways Family Shelter Framingham

SMOC - EA Pearl Street Framingham

SMOC - EA Scattered Sites

SMOC - ESG

SMOC - ESG Street Outreach

SMOC - GBMST - Greater Boston Mobile Stabilization

SMOC - Lincoln Street Marlborough

SMOC - LTLC Apartments

SMOC - LTLC Emergency Shelter Program

SMOC - LTLC ESG

SMOC - LTLC Hotels ESG-CV Project

SMOC - LTLC Overflow

SMOC - LTLC Permanent Supportive Housing Program

SMOC - LTLC Rapid Transition of Individuals

SMOC - LTLC Sponsor Based Permanent Supportive

SMOC - Meadows Program Ashland

SMOC - MetroWest Leased Housing

You selected

SMOC - MetroWest Leased Housing

☐ View column/field names ☐ Show cell position markers

Select a section to run

(all selected)

(all sections)

1. Annual Assessments Past Due

2. Annual Assessments Due Now

3. Annual Assessments Due Soon

Run the report

[View here](#) [Download as Excel file](#) [Email me](#)

Select “View here” to display the report output:

Report results Jump to a section: (choose)	
1. Annual Assessments Past Due	2. Annual Assessments Due Now
Tattoo Evening: Previous Assessment was due on 12/2/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	Pants Pageturn: Previous Assessment was due on 1/7/2023. LAUNCH ASSESSMENT WIZARD
Rhubarb Tearful: Previous Assessment was due on 9/25/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	Maple Furniture: Previous Assessment was due on 1/13/2023. LAUNCH ASSESSMENT WIZARD
Train Pantry: Previous Assessment was due on 8/17/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	Sweetgum Bustling: Previous Assessment was due on 12/23/2022. LAUNCH ASSESSMENT WIZARD
Peppermint Phortify: Previous Assessment was due on 5/1/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	Nebula Briskly: Previous Assessment was due on 1/4/2023. LAUNCH ASSESSMENT WIZARD
Tomato Phantasm: Previous Assessment was due on 7/8/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	
Tangelo Evening: Previous Assessment was due on 9/24/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	
Fragrant Knowing: Previous Assessment was due on 7/1/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	
Blue Nearly: Previous Assessment was due on 6/15/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	
Delight Typical: Previous Assessment was due on 10/21/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	
Boysenberry Puffy: Previous Assessment was due on 6/26/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	
Maple Pecuniary: Previous Assessment was due on 11/1/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	
Earthquake Papacy: Previous Assessment was due on 11/1/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	
Wasabi Pantry: Previous Assessment was due on 12/1/2022 and is OVERDUE. LAUNCH ASSESSMENT WIZARD	
	3. Annual Assessments Due Soon
	Princeton Puckett: Upcoming Assessment is due on 2/1/2023. LAUNCH ASSESSMENT WIZARD
	Cashew Publicity: Upcoming Assessment is due on 1/26/2023. LAUNCH ASSESSMENT WIZARD
	Report completed in 0:00 minutes:seconds.

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If an Annual Assessment is due use the **“Launch Assessment Wizard”** link to record the Annual Assessment.

The link will bring you directly to the client Income and benefits form. If you do not see the **“Launch Assessment Wizard”** link let the HMIS support team know by emailing support@vestama.zendesk.com.

The Annual Assessment must be recorded each year. If a client intake data is 12/2/2020, there should be corresponding annual assessments on or about 11/2/2020, and 1/1/2023.

VESTA does an excellent job with assisting users on what date range should be used for the annual assessment.



Annual assessment wizard for a primary client (step 1 of 3)
Tattoo Evening at CBVQ - Bedford Veterans' Quarters

Date assessment was completed with client ?

Income and benefits

Primary client's intake date in this project

Applicable anniversary date

Expected date range of assessment

12/2/2020	12/2/2022	11/2/2022 - 1/1/2023
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As mandated by HMIS Data Standards, clients in your project longer than one year are required to have an Annual Assessment recorded every year on the client's anniversary of intake. The Assessment may be recorded starting 30 days prior to the anniversary. The Assessment includes income/benefits and health insurance data for everyone in the household, as well as rental data for applicable projects.

Income from any source? ?

Employment income

Earned income from employment ?

Other cash income

Unemployment insurance

Supplemental Security Income (SSI)

→ SSI amount

Social Security Disability Insurance (SSDI)

VA non-service-connected disability pension ?

VA service-connected disability compensation ?



Private disability insurance	No
Worker's compensation	No
Temporary Aid for Needy Families (TANF)	No
General assistance	No
Retirement income from Social Security	No
Pension or retirement income from a former job	No
Child support	No
Alimony or other spousal support	No
Other source ?	No
Total monthly income (calculates automatically) ?	854.40
Non-cash benefit received from any source? ?	Yes
Non-cash benefits	<input checked="" type="checkbox"/> SNAP - Food stamps <input type="checkbox"/> WIC-Special Supplemental Nutrition Program for Women, Infants, and Children <input type="checkbox"/> TANF child care services <input type="checkbox"/> TANF transportation services <input type="checkbox"/> Other TANF-funded services <input checked="" type="checkbox"/> Other source
→ If other source, specify	section 8 subsidy

Step 1 of 3: 1-Income and benefits | 2-Health insurance | 3-Special needs |

Cancel Previous Next

Complete the **Income and benefits** form and select “**Next**” at the bottom right to continue to **Step 2 – Health Insurance**.



Annual assessment wizard for a primary client (step 2 of 3)
Tattoo Evening at CBVQ - Bedford Veterans' Quarters

Date assessment was completed with client ?

Health insurance

Use this form to record a client's medical insurance information.

This person has some form of health insurance or other medical benefit in effect

If yes is chosen above, at least one of the insurance types or medical benefits below must also be yes.

If One Care, please select both Medicaid / MassHealth and Medicare.

Medicaid / MassHealth	<input type="text" value="Yes"/>
Medicare	<input type="text" value="No"/>
Children's Health Insurance Program (CHIP)	<input type="text" value="No"/>
Veterans Administration (VA) Medical Services	<input type="text" value="Yes"/>
Employer-provided health insurance	<input type="text" value="No"/>
Health insurance obtained through COBRA	<input type="text" value="No"/>
Private pay health insurance	<input type="text" value="No"/>
State health insurance for adults	<input type="text" value="No"/>
Indian Health Services Program	<input type="text" value="No"/>
Other	<input type="text" value="No"/>

Step 2 of 3: 1-Income and benefits | **2-Health insurance** | 3-Special needs |

Complete the **Health insurance** form and select **Next** at the bottom right to continue to **Step 3 – Special needs**.



Annual assessment wizard for a primary client (step 3 of 3)
Tattoo Evening at CBVQ - Bedford Veterans' Quarters

Date assessment was completed with client ?

Special needs
This form is for recording a client's special needs and potential issues affecting a client's ability to maintain housing. It does not indicate a formal diagnosis of disability.
 indicates fields used in determining chronic homelessness.

Special needs

Chronic health condition ?
Yes

→ Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently?
No

→ Specific condition ?

<input type="checkbox"/> Angina	<input type="checkbox"/> Epilepsy / seizures	<input type="checkbox"/> Post-traumatic stress disorder
<input type="checkbox"/> Arthritis	<input type="checkbox"/> Fibromyalgia	<input type="checkbox"/> Sickle cell anemia
<input type="checkbox"/> Arthritis, rheumatoid	<input type="checkbox"/> Gout	<input type="checkbox"/> Skeletal pain
<input type="checkbox"/> Asthma, severe	<input type="checkbox"/> Hepatitis	<input type="checkbox"/> Stroke
<input type="checkbox"/> Bronchitis, chronic	<input checked="" type="checkbox"/> Hypertension	<input type="checkbox"/> Thyroid condition
<input checked="" type="checkbox"/> Cancer	<input type="checkbox"/> Kidney conditions	<input type="checkbox"/> Traumatic brain injury
<input type="checkbox"/> Coronary heart disease	<input type="checkbox"/> Liver condition	<input type="checkbox"/> Other cognitive impairment
<input type="checkbox"/> Dementia	<input type="checkbox"/> Lupus	<input type="checkbox"/> Other heart disease / condition
<input type="checkbox"/> Diabetes	<input type="checkbox"/> Migraine / severe headache	<input type="checkbox"/> Other
<input type="checkbox"/> Emphysema / COPD		

Substance use disorder
Drug use disorder

→ Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently?
No

Developmental / cognitive disability ?
Yes

Mental health disorder
Yes

→ Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently?
No

Complete the **Special needs** form and select **Next** at the bottom right to complete the Annual Assessment. You will be brought back to the Project dashboard.

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You may also view the **Client Summary** page to show alerts about upcoming and overdue Annual Assessments. If an Annual Assessment is due use the “**Launch Assessment Wizard**”.

To verify the Annual assessment has been completed view the **Income and benefits**, **Health insurance** and **Special needs** forms, and look for the record Type “**Annual assessment**”

Verify the Annual assessment date is no more than 30 days before or after the one-year anniversary of the **Intake** date.

Client Info

Client Summary

Basic client info

Household

Contacts

Messages

Services

Encounters

Tools

Assessment

Budgeting

Case Plan

Medical

Special needs

Case Record

Intakes / Exits

Income and benefits

Health insurance

Rental Data

Incidents

Legal History

Documents

Homeless Cert.

Consents

Documents

Income and benefits

This form is for recording a client's cash income and non-cash benefits.

Date	For intake on	Type
1/23/2023	2/1/2013	Annual assessment
2/2/2022	2/1/2013	Annual assessment
2/1/2021	2/1/2013	Annual assessment
2/3/2020	2/1/2013	Annual assessment
2/28/2019	2/1/2013	Annual assessment
2/7/2018	2/1/2013	Annual assessment
2/6/2017	2/1/2013	Annual assessment
2/24/2016	2/1/2013	Annual assessment
2/1/2015	2/1/2013	Annual assessment
2/1/2014	2/1/2013	Annual assessment
2/1/2013	2/1/2013	Intake

