

Annual Assessments in ONE



This task is completed by *service providers* in ONE.

Complete an **Annual Assessment** within +/- (before or after) 30 days of tenant's anniversary date.

Overview

Service providers should complete an Annual Assessment for all PSH tenants. Annual Assessments provide for ongoing information about clients to be tracked in the ONE System. While necessary for reporting requirements, this also helps ensure the best possible support to clients from any organization using the ONE System. Annual Assessments should be completed on or near the tenant's anniversary date, so they will be completed on a rolling basis across all clients in the building.

Step by Step

 Start by ensuring that you are under the correct agency. You can change agencies through the dropdown list under your name in the top right corner of the screen.



2. From the client's profile, click **Programs** tab, then select the program enrollment.

ROFILE	HISTORY	SERVICES	PROGRAMS	ASSESSMENTS	NOTES	FILES	CONTACT	LOCATION	REFERRAL	LS		
OGRAM	HISTORY											
	Program Name										Start Date	End Date
Z	Empress - GF PH - Housing wi [TRAINING] Dep	th Services (no artment of Hor	o disability require melessness and S	d for entry) upportive Housing							11/23/2022	Active
а.	Methou i.	d 1: From PROGRAM: EN	the prog MPRESS-GF	Services Assessments	Notes File	t, clic	k the "	'+" to t	he righ × Exit	It of Status A 114 Crite Action Action Program Type: Program Start Date: Assigned Starf	ssessments	
		Progra	ration Service History	Referral				LINK FI	ROM HISTORY	No Statuses		
	ii.	Toggl Add P	e client i Rogram ass	name(s) tl sessment	nen cli	ck th	e Add /	Annual ⊗	Asses	s ment butto	n	
		A	P. Furball DD STATUS A	SSESSMENT	ADD	annual	ASSESSMI	ENT				

iii. Complete the Annual Assessment, then click Save and Close

- b. Method 2:
 - i. From the program enrollment, click the Assessments tab



- ii. Click the Start button on Annual Assessment
- iii. Toggle client name(s) then click the Add Annual Assessment button
- iv. Complete the Annual Assessment, then click Save and Close

Annual Assessment Warnings

Staff can set assessment warnings to receive a notification when the annual assessment is due two different ways in the system.

- 1. Program Enrollments
 - a. Make sure you are an assigned staff on the client's enrollment. If you do not see your name next to **Assigned Staff**, click the **Edit** icon to add yourself, then click **Save Changes**
 - b. Click the Edit icon to toggle on Assessment due every year Notification

ROGRAM: EMPI	RESS - GF								1 4 ACTIVE PROGRAM	
									Program Type:	
Enrollment	History	Provide Services	Assessments	Notes	Files	Units/Beds	Forms	× Exit	Program Start Date:	
									Assigned Staff:	
Program	Program Service History LINK FROM HISTORY								Head of Household:	
									Program Group Members	
									No active members	
									Status Assessments 🕀	
Description	_	Consister Data	(and						Assessment due every year Notification: ON 🧷	
Reservati		delvice Ne	Neterial					Assessment due every year Notification: OFF		

2. User Account Settings

a. Click your initials at the top right of the screen, then click Account Settings



b. At the bottom of the **My Info** screen, toggle on the **Assessment Due Warning**, set the timeframe, click **Save Changes**





