Annual Assessments in ONE

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

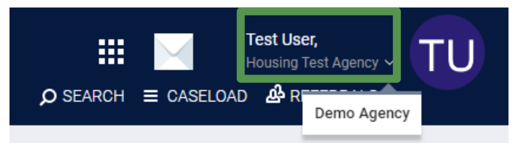
Complete an **Annual Assessment** within +/- (before or after) 30 days of tenant's anniversary date.

<u>Overview</u>

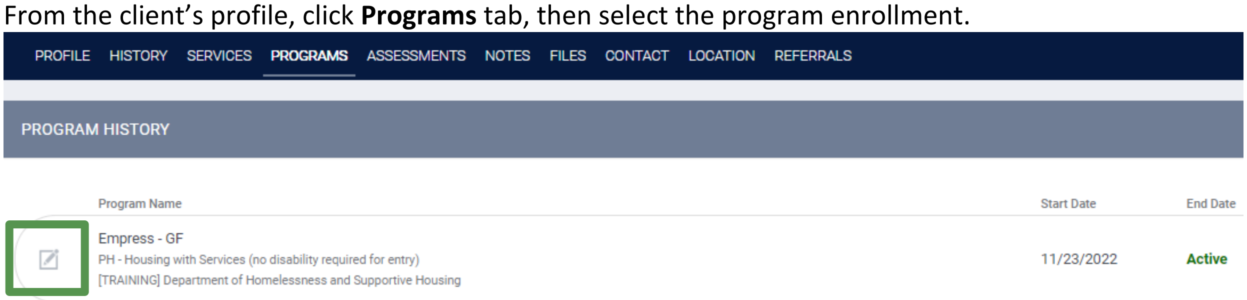
Service providers should complete an Annual Assessment for all PSH tenants. Annual Assessments provide for ongoing information about clients to be tracked in the ONE System. While necessary for reporting requirements, this also helps ensure the best possible support to clients from any organization using 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.

<u>Step by Step</u>

1. 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.

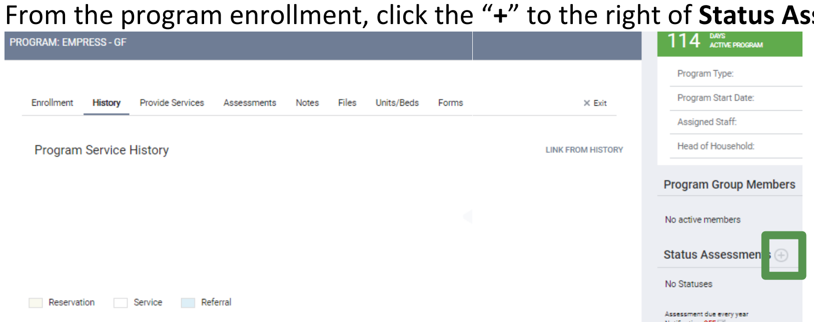


2. From the client's profile, click **Programs** tab, then select the program enrollment.

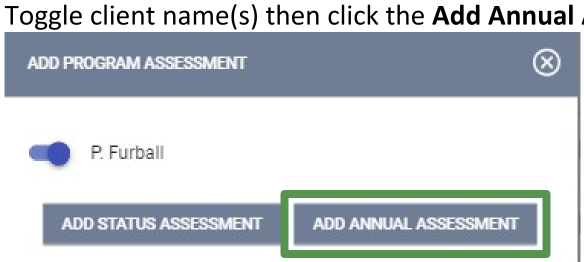


   a. Method 1:

      i. From the program enrollment, click the "**+**" to the right of **Status Assessments**

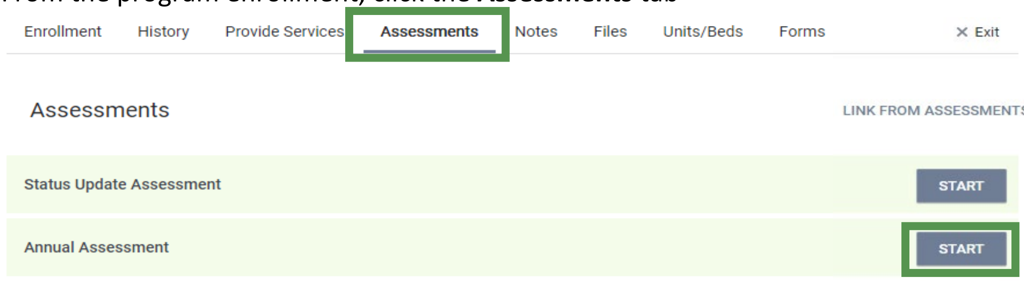


      ii. Toggle client name(s) then click the **Add Annual Assessment** button



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

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

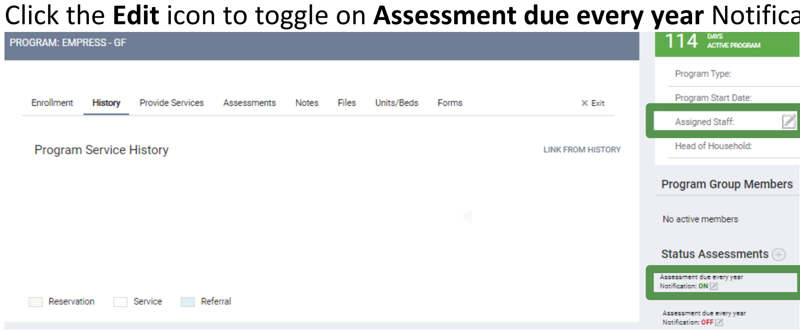


   ii. Click the **Start** button on **Annual Assessment**
   iii. Toggle client name(s) then click the **Add Annual Assessment** button
   iv. Complete the Annual Assessment, then click **Save and Close**

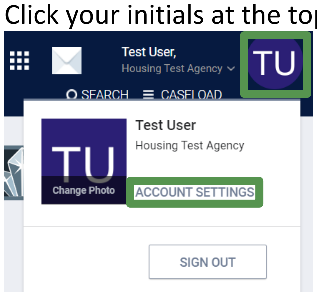
Annual Assessment Warnings

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



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**