# How To Fix Common Annual Assessment Errors

Annual Assessments are due for clients a year into their enrollment, assuming they have not exited the program before the assessment is due. Following, they are due every year up to 30 days before or 30 days after the program start date. Here are common data entry errors that can happen when entering assessments. These errors will continue to populate on reports if a previous year's annual assessment is incorrect even if a correct assessment was entered for the current year. That is the system will always pull the incorrect assessment/missed assessment until it has been corrected and/or updated.

Assessment Added Several Months Before and/or After Actual Due Date
In the image below the client was enrolled into program on 03/01/2017. This would mean by default the Annual Assessment would be due on or before (30) days from date of program start date. In this case any date between 02/01/2018 and 03/31/2018 or it could be on the exact date, 03/01/2018. In review of the image below, we see an assessment was added for this client, but the date is 10/03/2018. This does not meet the required timeframe and will kick back an error on the report. You will need to go back and correct the date.
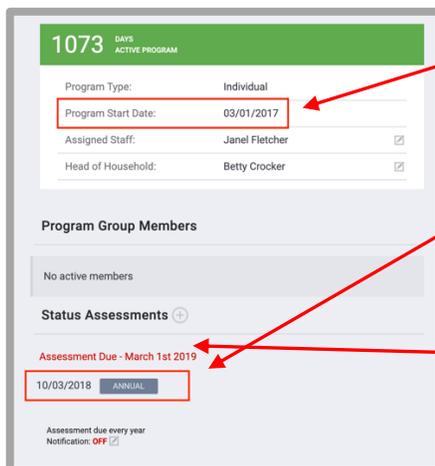
Here is the Program Start Date for the client

Here is the Assessment that was submitted for the incorrect timeframe

Here the system is notifying you when the next assessment is due for the client. Note the date is 03/01/**2019 –** *Even if you enter a 2019 Assessment, you are still missing the 2018 – this assessment will need to be entered to prevent the report from kicking back an error.*

Annual Assessments vs. Status Assessments
Another data entry error that is common, are Annual Assessments that are entered to reflect a change in say income or health insurance for example. Recall that when these types of changes occur for the client, a Status Assessment should be entered - not an Annual Assessment. Annual Assessments as the name states, are given on an Annual basis, regardless of changes that have occurred for the client – these changes, need to be captured in a Status Assessment. Please see image below of an example of how this may look.

If an Annual Assessment is entered in error of a Status Assessment be sure and add the Status Assessment to capture the changes.

You will need to contact the Helpdesk to have them delete the Annual Assessment that was added in error.

Setting the Assessment Due Date Notification

If you want to ensure you do not miss updating an Annual Assessment for a client, you can set up the notification setting. This will remind you when an assessment is due. There are two ways in which this can be done.

Account Settings

One is through your Account Settings. This is located next to your login photo (if you have one) or your initials. Upon opening the settings, at the bottom you will see Assessment Due Warning, you can select the toggle to on (blue) and select how soon you'd like to receive notifications (see image below). This way you will always receive a reminder. This setting will be applied to all clients, not just the one you are in at the time of the change.
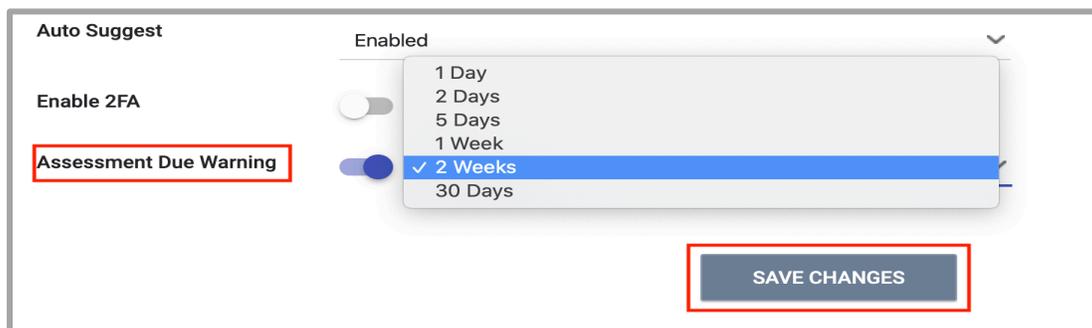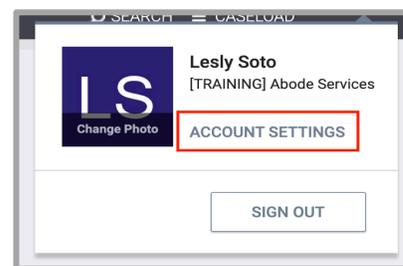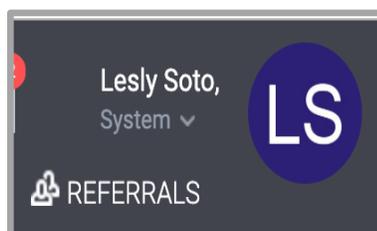
Assessment Notification

Another way is by turning on the Notification that appears on the client screen. You can set the Notification here from OFF to ON. As with the previous option, you will also be able to select the timeframe in which to be notified (see images below).
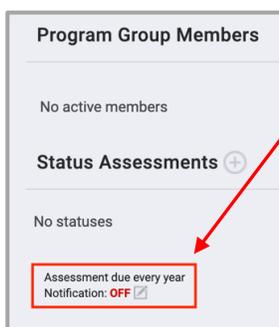
This is where you will see the option to turn on notifications.

In the image to the right where the red circle is, click with the mouse, it will open the Change Case Status pop-up. Turn on the toggle (blue). Select time frame.
Select **SAVE** once you are done. You will now receive notifications.