Annual Assessments: When to Complete Them

In the Homeless Management Information System (HMIS), complete an Annual Assessment for every household still enrolled on the anniversary of the Head of Household's Project Start Date, within 30 days before or after that date, and again every year they stay enrolled. Source: FY 2026 HMIS Data Standards Manual, v1, effective 10/1/2025.

Missing or late assessments show up as data quality errors in the Annual Performance Report (APR) and Consolidated Annual Performance and Evaluation Report (CAPER) and weaken the income measures in the System Performance Measures.

The rules at a glance

- **Clock:** always the **Head of Household's Project Start Date**, even for members who joined later. Never the Housing Move-In Date.
- **Window:** 30 days before to 30 days after the anniversary. Earlier Updates or assessments don't move it.
- **Whole household:** assess the Head of Household and all other members at the same time.
- **Stage:** save with Data Collection Stage = **Annual Assessment**. An Update dated in the window does not count.
- **Every year:** a new record each year, even if nothing changed.
- **Exits during the window:** if the household exits before the Annual Assessment is completed, no Annual Assessment is needed. Complete the Exit assessment instead. Reports from the U.S. Department of Housing and Urban Development (HUD) check Annual Assessments only for clients still enrolled; clients who have exited are checked on their exit data.

When it's due



The Head of Household's start date sets the window for the whole household. Updates do not move it.

Annual Assessment window · 30 days either side of the anniversary

The window repeats every year the household stays enrolled. In this example, the next one runs 2/13/2027 to 4/14/2027.

Permanent Supportive Housing (PSH): two annual dates

PSH households have two separate annual reviews, and only one goes in HMIS. The housing recertification is **not** entered in HMIS, does not count as the HMIS Annual Assessment, and does not move the HMIS window.

	HMIS Annual Assessment (services)	Housing recertification
Based on	Project Start Date (program entry)	Housing Move-In Date
Completed by	Partner agency	Columbus Metropolitan Housing Authority (CMHA), Community Shelter Board, or the partner, depending on the program
Entered in HMIS?	**Yes**, as Data Collection Stage = Annual Assessment	**No**
Example: start 3/15/2025, move-in 6/1/2025	Window 2/13/2026 to 4/14/2026	Around the 6/1 move-in anniversary

If the client refuses or can't be reached

Still create the Annual Assessment inside the window. A refusal is recorded, not skipped.

- **Client refuses:** save the record with Data Collection Stage = Annual Assessment and answer **Client prefers not to answer** (the client knows the information but chooses not to give it).
- **Client doesn't know:** answer **Client doesn't know**.
- **Staff couldn't collect it** (client unavailable, no contact in the window): answer **Data not collected**.
- **Ask first:** never pick these without asking the client. Staff can't decide for the client.
- **No penalty to the client:** HUD does not intend for a refusal to cost a client housing or services.
- **Don't skip it:** refusals and Data not collected still count as missing data in reports, so note your outreach attempts in the client file.

How to enter it

1. Find the Head of Household's Project Start Date and mark the window on your calendar.

2. Schedule the household for a date inside the window.
3. Meet with the household and collect current information. Do not create the Annual Assessment in HMIS before this meeting.
4. In HMIS, open a new assessment with Data Collection Stage = Annual Assessment. Set the Information Date to the day you met, which must fall inside the window.
5. Complete it for the Head of Household, then every other household member, in the same sitting.

Common issues and fixes

Issue	Fix
PSH housing recertification (move-in date) treated as the HMIS Annual Assessment	They are separate. The HMIS Annual Assessment always follows the Project Start Date.
Window counted from a member's own start date	Use the Head of Household's anniversary for everyone
Information Date outside the window	Complete it between 30 days before and 30 days after the anniversary
Entered as an Update	Use Data Collection Stage = Annual Assessment
Only the Head of Household assessed	Assess every member at the same time
Skipped because nothing changed	Create a new record anyway

Checklist

- ☐ Household still enrolled when the window opens (30 days before the anniversary)
- ☐ Information Date within 30 days of the Head of Household's anniversary
- ☐ Data Collection Stage = Annual Assessment
- ☐ Every household member assessed in the same sitting

Questions? Email HMIS@csb.org.

Source: FY 2026 HMIS Data Standards Manual, Data Element Structure and 5.03 Data Collection Stage; FY 2026 HMIS Standard Reporting Terminology Glossary, Annual Assessment section.