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 06/25/2021. 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 05/01/2022 and 06/31/2022 or it could be on the exact date, 06/25/2022.

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.

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.