Watsonville/Santa Cruz City & County Continuum of Care (CoC)

HMIS Quarterly Assessment Policy

Every 90 days HMIS users must complete a Current Living Situation (CLS) and Status Update Assessment (referred to here as quarterly assessments) for all active clients. To make it easier for HMIS users to know when client assessments are due, as of **February 1, 2025,** quarterly assessments must be completed during each of the following designated assessment months – **February, May, August, and November**, regardless of the client's program enrollment date.

In other words, quarterly assessment due dates are no longer based on the client's program enrollment date. Instead, quarterly assessments for ALL active clients must be completed during the months of February, May, August, and November.

Quarterly Assessment Completion Timelines:

	At Program Enroll-ment	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Current Living Situation (CLS) Assessment	Yes	No	Yes	No	No	Yes	No	No	Yes	No	No	Yes	No
Status Update (SU) Assessment	No	No	Yes	No	No	Yes	No	No	Yes	No	No	Yes	No

Approved: 3/6/2025

Example Quarterly Assessment Requirements:

	Required Assessments											
	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Example #1 Program Enrollment 6/7/2024	n/a	CLS & SU	n/a	n/a	CLS & SU	CLS at Program Enroll-ment	n/a	CLS & SU	n/a	n/a	CLS & SU	n/a
Example #2 Program Enrollment 1/27/2025	CLS at Program Enroll-ment	CLS & SU	n/a	n/a	CLS & SU	n/a	n/a	CLS & SU	n/a	n/a	CLS & SU	n/a
Example #3 Program Enrollment 4/30/2025	n/a	CLS & SU 2026 on	n/a	CLS at Program Enroll-ment	CLS & SU	n/a	n/a	CLS & SU	n/a	n/a	CLS & SU	n/a

CLS = Current Living Situation assessment required

SU = Status Update Assessment required

Tracking Quarterly Assessments

A Quarterly Assessment report is available in HMIS to help track the status of client's quarterly assessments. This report, found in the HMIS Data Analysis tab under Santa Cruz Clarity System Reports, provides the status of client's quarterly assessments during each designated "assessment month" (see example below).

	Status Assessment Type	November 2024 Assessment Status	February 2025 Assessment Status	May 2025 Assessment Status	August 2025 Assessment Status	November 2025 Assessment Status
1	Current Living Situation	Yes	No	No	No	No
2	Current Living Situation	Yes	No	No	No	No
3	Current Living Situation	No	No	No	No	No
4	Current Living Situation	No	No	No	No	No
5	Current Living Situation	Yes	No	No	No	No
6	Current Living Situation	Yes	No	No	No	No
7	Current Living Situation	No	Yes	No	No	No
8	Current Living Situation	No	Yes	No	No	No
9	Current Living Situation	No	Yes	No	No	No
10	Current Living Situation	No	Yes	No	No	No
11	Current Living Situation	No	Yes	No	No	No
12	Current Living Situation	No	No	No	No	No
13	Current Living Situation	Yes	No	No	No	No
14	Current Living Situation	Yes	No	No	No	No
15	Current Living Situation	Yes	No	No	No	No
16	Current Living Situation	No	Yes	No	No	No
17	Current Living Situation	Yes	No	No	No	No
18	Current Living Situation	Yes	No	No	No	No
19	Current Living Situation	No	No	No	No	No
20	Current Living Situation	Yes	No	No	No	No
21	Current Living Situation	Yes	No	No	No	No
22	Current Living Situation	No	No	No	No	No
23	Current Living Situation	Yes	No	No	No	No

Note: this report is only available to HMIS users with a Manager's license or Looker/Data Analytics access. Other HMIS users should contact their agency's HMIS lead for assistance in accessing the information.

What's NOT Changing?
The quarterly assessment policy change does not impact Annual Assessments, as required by HUD.

- **Annual Assessments** still need to be completed every year on the client's program enrollment anniversary

If you have any questions on the policy change or quarterly assessment requirements, please contact Housing for Health/Count of Santa Cruz's HMIS Lead.