



Project Updates

Managing Projects

How to update project records



Keeping your project records updated in Clarity is essential. Some projects will require regular reviews or updates, as enrolled clients keep receiving services. Other projects will require annual reviews and updates.

Project record updates

When to perform project updates?

- ✓ Regular updates are necessary for projects in Clarity, performed through interim reviews also known as **Status Update Assessments**.
- ✓ Other projects will need an annual update if a client has been enrolled in a program for over a year, even if no information has changed. This is called **Annual Assessment**.

About Annual Assessments

- ✓ Annual Assessments are only for clients enrolled in programs for a year or longer.
- ✓ Annual Assessments must be dated **within 30 days** (before or after) the client's project entry anniversary.
- ✓ Assessments may vary based on project type and agency-specific data collection and reporting needs.
- ✓ To update a record that requires an annual assessment, follow the same steps as in interim reviews or status assessments.

1

Search for the client record

Search for a client that requires an interim review. Then, go to the *Programs tab* of the client's record.

2

Program history

Locate the program from the *Program History list*. Hover over the program name and select Edit.

Then, from the program's tab, select *Assessments*.

3

Add Status Assessment

Select *Add Status Assessment*. You'll see the enrollment assessment questions.

A pop-up window appears with the head of the household and the household member's name, if any.