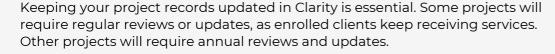
Project Updates

Managing Projects

How to update project records





Project record updates

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.

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.

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.

Note: This guide covers the essentials of the course Managing Project Entries, Updates, and Exits in Clarity. Review the training course for a complete overview.