

3M Assessment Due Chart

You should fill out a Quarterly Assessment (3M) every three months on every enrolled partner/consumer/client. The 3M is based upon the enrollment/partnership month. You have a 45 day window (15 days prior and 30 days after) the three month anniversary to complete the 3M. If you do not get the form completed by the end of the 30th day after the due date, skip that 3M and **complete the next one when it is due**.

Example:

Homer Simpson began his partnership on March 24th. He has a 3M assessment due every June 24th, September 24th, December 24th and on his anniversary.

Today’s date is August 31. Homer’s last 3M was due on June 24, but the 45 day window for that assessment has passed (June 9 – July 24). Therefore, his next assessment is due on September 24th. The 45 day window on this 3M begins September 9 (15 days before the due date) and ends on October 24 (30 days after the due date). If the 3M is not completed by October 24, then it should be skipped and his next one is due on December 24.

Enrollment Month	Quarterly Assessments Due Every ...
January	April, July, October, January
February	May, August, November, February
March	June, September, December, March
April	July, October, January, April
May	August, November, February, May
June	September, December, March, June
July	October, January, April, July
August	November, February, May, August
September	December, March, June, September
October	January, April, July, October
November	February, May, August, November
December	March, June, September, December

Or, you can look at it another way ...

Partnership began during the month of ...	3M Assessment due in ...
April, July, October, January	January
May, August, November, February	February
June, September, December, March	March
July, October, January, April	April
August, November, February, May	May
September, December, March, June	June
October, January, April, July	July
November, February, May, August	August
December, March, June, September	September
January, April, July, October	October
February, May, August, November	November
March, June, September, December	December