CAS Notifications in HMIS

Introduction

CAS has been set up in HMIS to provide notifications to
- CAS Admins – users at the lead agency (MDHA)
- Case Managers – users with clients assigned to their caseload in HMIS
- CAS Contact for each housing provider – one user determined by each agency
- Prioritizing Agency User – users with access to the Dallas and Collin Counties CAS organization in HMIS

The following table provides information about each notification, how it is triggered, and what actions are taken by the system or are required by the person receiving the notification

Notification	Who	Where	Why/Action Completed	Action Taken/Required
Referral Made	• Prioritizing Agency • CAS Contact at housing provider	• Email • Notification in ClientTrack	The CAS Admin referred the client from the CAS Queue to a housing provider.	The referral needs to be accepted or rejected by the agency receiving the referral.
Provider Status - No Show	• CAS Admin • Prioritizing Agency • Case Manager	• Email • Notification in ClientTrack	The housing provider marked the Referral Outcome as "No Show" because they accepted the referral, but there has been no client response for 7 days.	The client will display in the CAS Exit Queue to be exited from CAS by the CAS Admin.
Provider Rejects Referral	• CAS Admin	• Email • Notification in ClientTrack	The housing provider marked the Referral Outcome as "Unsuccessful referral: Provider Rejected" because they are not accepting the referral.	CAS Admin will have the opportunity to refer the client to a new program through the CAS Queue.
Client Rejects Referral	• CAS Admin	• Email • Notification in ClientTrack	The housing provider marked the Referral Outcome as "Unsuccessful referral: Client Rejected" because they accepted the referral, but the Client declined services.	First 4 client rejections, the client will display in the CAS Queue with the outcome status and the number of Client Rejections. After the 5th client rejection, the client will display in the CAS Exit Queue.

Client No Activity - 83 Days	• Case Manager	• Email • Notification in ClientTrack *Generated in a nightly process.*	It has been 83 days since the client's most recent Document Check (updated Documentation of Homelessness), and the client is at risk of being considered inactive in 1 week.	Case Manager should upload new documentation in Document Check to keep the client from going inactive.
Client No Activity - 90 Days	• Case Manager	• Email • Notification in ClientTrack *Generated in a nightly process.*	It has been 90 days since the client's most recent Document Check (updated Documentation of Homelessness), and the client is being considered inactive.	The client will display in the CAS Exit Queue to be exited from CAS by the CAS Admin.
Documentation Incomplete	• Case Manager	• Email • Notification in ClientTrack	The CAS Admin marked "Documentation Incomplete" because certain criteria to approve the client for referral is missing.	Case Manager should upload new documentation in Document Check to allow client to be referred.

Managing Notifications

Notifications in ClientTrack display in two ways: via a pop-up window when you log in and via the notification bell next to your name in the top right corner.

Pop-up Window
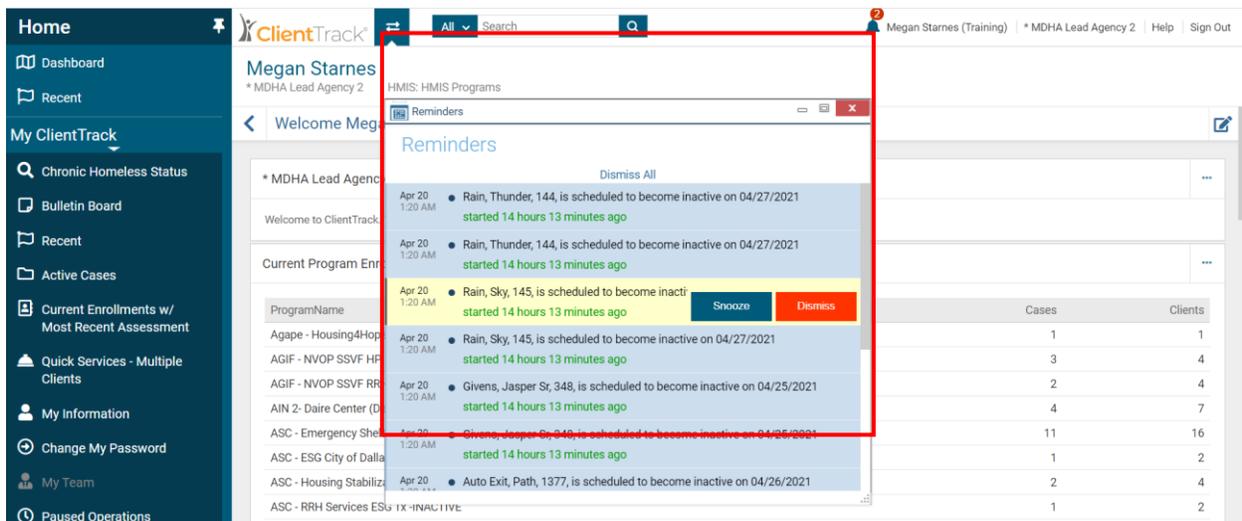
You can Snooze or Dismiss individual notifications by hovering over them (shown above). Snoozing the notifications will allow them to pop up again in several minutes. Dismissing notifications marks them as acknowledged and no longer displays them in the pop-up. You also have the option to Dismiss All at the top of the pop-up.

Notification Bell

You will see a red circle with a number inside next to the bell when you have new notifications. Click the bell to view the notifications.
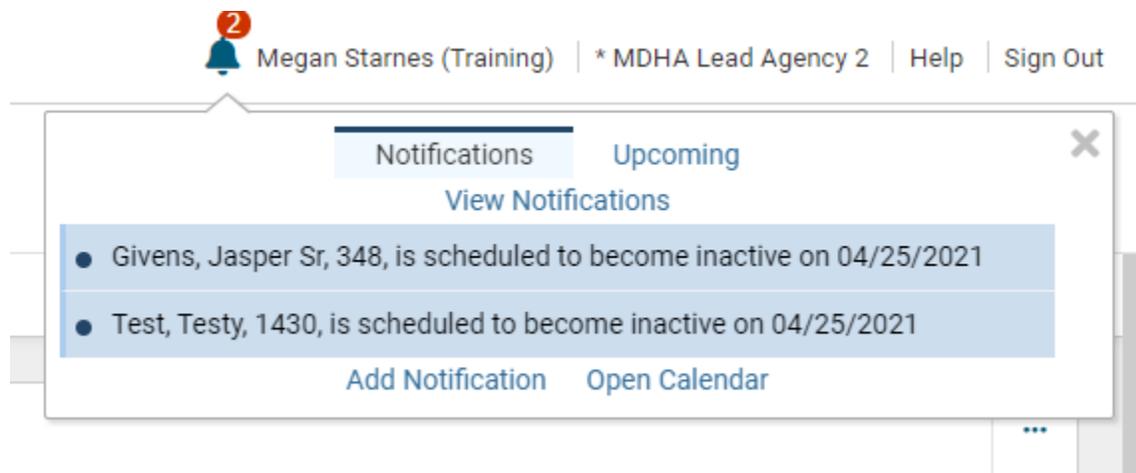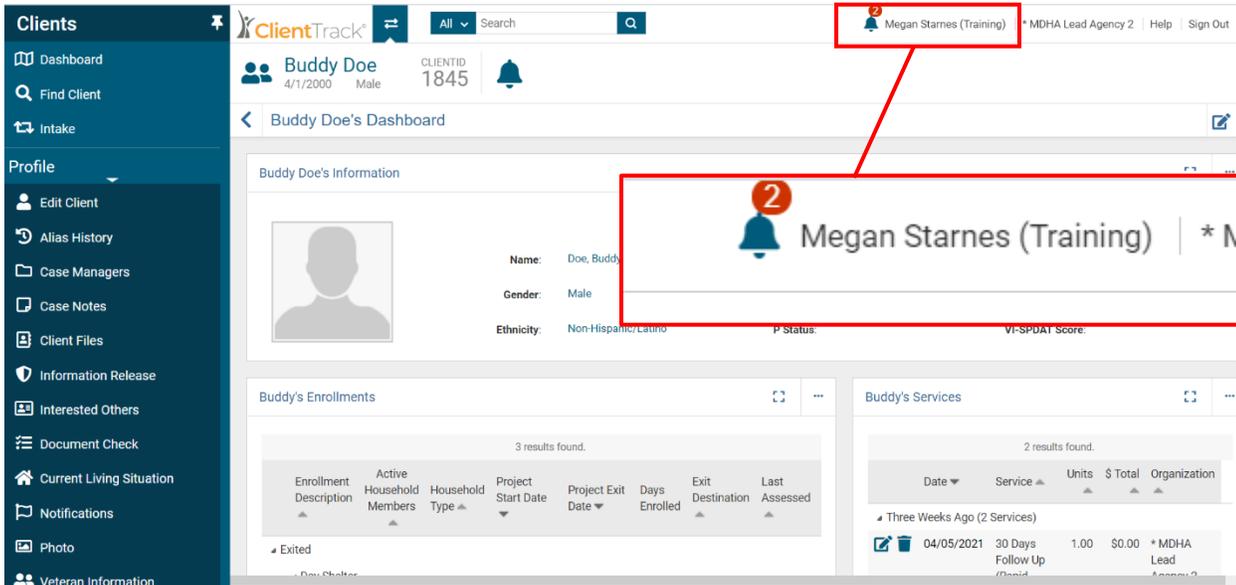
Clicking on the notification allows you to edit the details and alerts for that notification.

Calendar View

Click Open Calendar to see the notifications in a calendar view. The notification will display on the date you received the notification.

Viewing All Notifications

You can view previous notifications that you have dismissed, acknowledged, or otherwise marked as completed. Click View Notifications to see them all and filter to by action you've taken on them so far.