

HMIS Annual Assessment Tool

Introduction

This document will show how to utilize the HMIS Annual Assessment Tool.

1. Log into ClientTrack and navigate to your Settings Icon (your initials).

Home / Welcome Lisa Heise



2. Set Organization to Your Agency, if necessary.

Settings



ACCOUNT SETTINGS

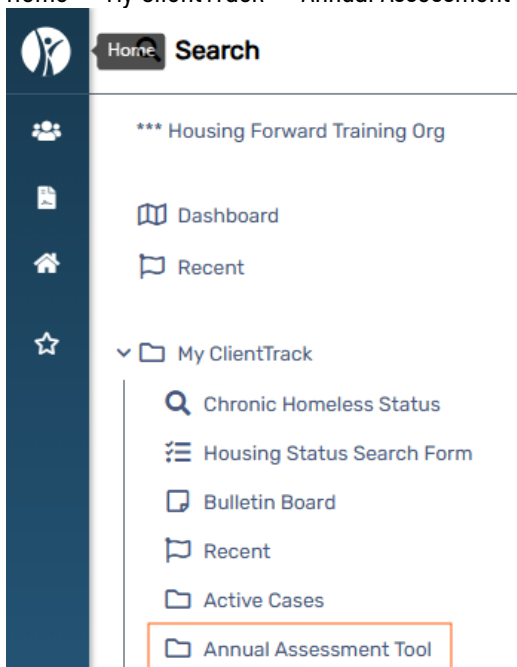
Workgroup

HMIS: HMIS Programs

Organization

*** Housing Forward Training Org

3. Navigate to your Home workspace and select Annual Assessment Tool
Home -> My ClientTrack -> Annual Assessment Tool



- This tool is intended to assist in finding Annual Assessments that needs to be completed.

The Annual Assessments Due date will include filter to show all open enrollments where an annual assessment has not been completed, and the date selected is within the sixty-day window of allowed for annual assessments.

To use this tool, select the Due Date (defaults to the current date).

You may also filter by Organization, Project, Funding Source or Client ID.

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HMIS Annual Assessment Tool

Annual Assessments Due:

10/23/2025 

Overdue Annual Assessments:

☐ 

Organization:

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Project:

-- SELECT -- 

Funding Source:

-- SELECT -- 

Client ID:

 Search

- You may view this report through HMIS.

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HMIS Annual Assessment Tool

Pagination for HMIS Annual Assessment Tool



74 results found.

Case Name	Client Name	Enroll ID 	Project Name	Entry Date	Anniversary Date 	Start of 60 Day Window 	End of 60 Day Window 	Days Enrolled	Case Manager
*** Homeless, Mister	Homeless, Mister	12888	TRAIN - HHS: PATH - Street Outreach	10/01/2020	10/01/2025	09/01/2025	10/31/2025	1848	
*** Test, Test	Test, Test	12115	TRAIN - HUD: CoC - Permanent Supportive Housing	11/15/2024	11/15/2025	10/16/2025	12/15/2025	342	
*** Subject, Test	Subject, Test	12018	TRAIN - HUD: CoC - Permanent	11/15/2024	11/15/2025	10/16/2025	12/15/2025	342	HFTTrain1

6. You may download it as pictured below.

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Annual Assessments Due: 10/23/2025

Excel Export

7. By selecting the action dots, you will see options to Edit the Enrollment, Complete the Annual Assessment, or choose Select to view the neighbor's Dashboard.

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Test, Test	Test, Test	12115	TRAIN - HUD: CoC - Permanent Supportive	11/15/2024	11/15/2025	10/16/2025	12/15/2025	342	

Actions: Edit Enrollment, Complete Annual Assessment, Select