

# HMIS End User Checklist



This document provides a basic overview of daily, weekly, and monthly tasks that HMIS end users should be completing to maintain access and ensure data quality.

## Daily Tasks

- Log in to ClientTrack
- Check HMIS News
- Enroll and exit clients
- Record services
- Record case notes
- Complete update and annual assessments
- Check for paused workflows
- Check for CAS Referrals (if applicable)

## Weekly Tasks

- Use the Annual Assessment Tool
- Review enrollments on home workspace
- Check that Move-In Date (RRH, PSH, & OPH) and/or Date of Engagement (Street Outreach) has been completed

## Monthly Tasks

- Run Client Milestone Age Status report to check for clients aging into adulthood