



MONTHLY OFFICE HOURS

February 2026

Solving Homelessness Together • Dallas & Collin Counties

MEET YOUR HMIS TEAM



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TODAY'S AGENDA

February 26 – 1:00pm

01

Announcements

On-Site Reviews

02

ClientTrack Feature Highlight

Annual Assessment Tool

03

HMIS Deep Dive

Aging into Adulthood

04

Office Hours Reminders

Weekly · Monthly · Quarterly

01

ANNOUNCEMENTS

Relaunch of HMIS On-Site Reviews

ANNOUNCEMENTS

Relaunch of HMIS On-Site Reviews

- All providers will have an onsite monitoring in 2027.
- All end-users will be informed of what to expect during the HMIS Annual Training this coming fall.
- This is a HUD requirement.

NEED TO KNOW

March office hours will be dedicated to sharing more specifics about the on-site reviews and gathering feedback from end-users. Please be sure to attend.

ANNOUNCEMENTS

Provider Shout Out

- VA North Texas Health Care System significantly improved data quality over the last quarter

02

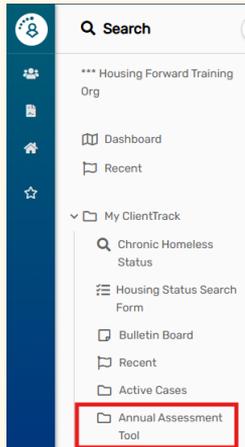
CLIENTTRACK FEATURE HIGHLIGHT

Annual Assessment Tool

CLIENTTRACK FEATURE: Annual Assessment Tool

1

Navigate to the Tool



2

Set Filters

A screenshot of the filter settings for the Annual Assessment Tool. The filters are as follows:

- Annual Assessments Due: 02/23/2026
- Overdue Annual Assessments: *i*
- Organization: *** Housing Forward Training Org
- Project: -- SELECT --
- Funding Source: -- SELECT --
- Client ID:

3

Review the List

A screenshot of the HMIS Annual Assessment Tool list view. The table displays the following data:

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
Evelash, 2	Evelash, 2	18567	ICA Test	10/23/2024	10/23/2025	09/23/2025	11/22/2025	488	
[+] Edit Enrollment									
[-] Complete Annual Assessment									
[-] Select									
Toes, Tommy	Toes, Tommy	18315	Emergency Shelter Night-night	09/15/2024	09/15/2025	08/16/2025	10/15/2025	526	
TRAIN - HUD: ESO-RUSH									
TRAIN - HUD: ESO-RUSH									

Resources: [Cheat Sheet & Video](#)

03

DEEP DIVE

Aging Into Adulthood

When a child turns 18 while enrolled in a program, there are different data requirements that must be completed.

AGING INTO ADULTHOOD: OVERVIEW

WHAT IS IT?

When a client enrolled in a program as a child turns 18 while still in the program

WHY DOES IT MATTER?

Impact on data quality:

If not addressed, the client will have missing data elements that are required for adults and not children.

Impact on reporting:

Missing data can result in errors in HUD reporting and can keep you from being able to submit your reports.

Impact on the people we serve:

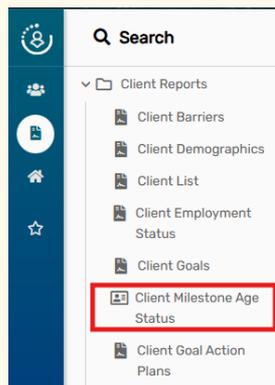
Without the missing information, we won't have a full picture of the client's situation and needs.

ACTIONS TO TAKE

1

Identify clients who are aging into adulthood

Go to Client Reports → Client Milestone Age Status.

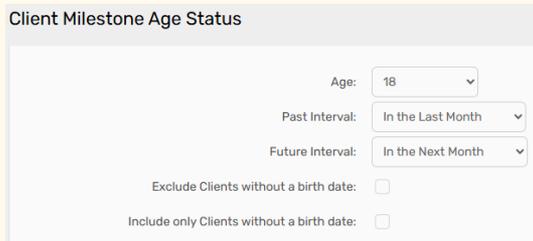


Who: Case Managers

2

Set Filters

Look for clients who have turned 18 in the past month, or will turn 18 in the next month.

A screenshot of the 'Client Milestone Age Status' filter settings. The 'Age' dropdown is set to 18. The 'Past Interval' dropdown is set to 'In the Last Month' and the 'Future Interval' dropdown is set to 'In the Next Month'. There are two checkboxes: 'Exclude Clients without a birth date:' and 'Include only Clients without a birth date:'. Both checkboxes are currently unchecked.

Who: Case Managers

3

Edit Entry Workflow & Complete Update Assessment

- Go to the client's dashboard and find the appropriate enrollment
- Click the three dots and select "Edit Entry Workflow"
- Update the newly required information:
 - Veteran Status
 - Prior Living Situation
- Go back to the dashboard and click the three dots again. Select "Update/Annual Assessment"
- Update the newly required information:
 - Income
 - Non-cash benefits

Who: Case Managers

OFFICE HOURS

WEEKLY

All HMIS End-Users

General Technical Assistance

Every Friday
10:30am – 11:30am

[Click here to join.](#)

MONTHLY

All HMIS End-Users

Specific HMIS Reinforcement

4th Thursday
1:00pm – 2:30pm

[Click here to join.](#)

QUARTERLY

HMIS Data Quality Officers

Technical Assistance for DQO Duties

2nd Tuesday following
End of Quarter
10:00am – 11:30am

[Click here to join.](#)

Previous Monthly Office Hours recordings are available [here](#) on the Housing Forward website.

Questions?

Thank you for joining Monthly Office Hours!

Submit a help desk ticket: help@housingforward.on.spiceworks.com

Next Office Hours: March 26, 2026 at 1:00pm ([link](#))

Resources: [HMIS Documents](#)