

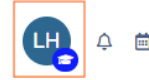
HMIS Annual Assessment Tool

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

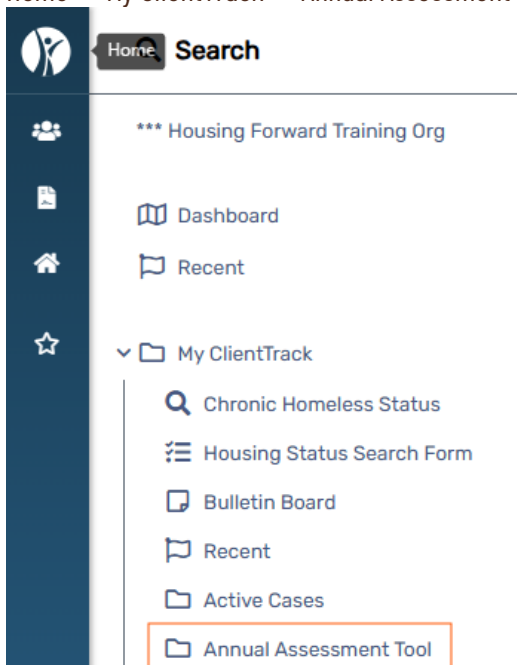
Workgroup

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



4. 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.

Lisa Heise

*** Housing Forward Training Org

HMIS: HMIS Programs

HMIS Annual Assessment Tool

Annual Assessments

Due: 10/23/2025

Overdue Annual Assessments: ☐

Organization: *** Housing Forward Training Org

Project: -- SELECT --

Funding Source: -- SELECT --

Client ID:

Search

5. You may view this report through HMIS.

Lisa Heise

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HMIS: HMIS Programs

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	HFTrain1

- 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.

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	12715	TRAIN - HUD: CoC - Permanent Supportive	11/15/2024	11/15/2025	10/16/2025	12/15/2025	342	