



MONTHLY OFFICE HOURS

September 2026

Solving Homelessness Together • Dallas & Collin Counties



MEET YOUR HMIS TEAM



Freda M. Nelms

Director
Data Mgmt & Reporting



Eryca Peters

HMIS Manager



Phil Force

HMIS Administrator



Lisa Heise

HMIS Administrator



Emmett Altzman

HMIS Administrator of
Data Quality

TODAY'S AGENDA

September 24, 2026 1:00pm

01

Announcements & Reminders

02

ClientTrack Feature Highlight

Favorites

03

HMIS Deep Dive

Paused Workflows & Annual Assessments

04

Provider Spotlight

01

ANNOUNCEMENTS

ANNOUNCEMENTS

Announcements

- HMIS End User Incentives start with today's meeting!
 - Sign in to be entered into the monthly drawing
 - Winner(s) will be announced in next month's office hours
- Reporting season is coming!
 - We may reach out to you about data clean-up, so keep an eye on your inbox



Sign in here!



ANNOUNCEMENTS

Announcements

- Security Officer Orientation is now live in [LEARNS!](#)
 - SOs – please make plans to complete by October 31
- Mandatory Annual Training – Part 1 Online
 - Will be live October 1
- Mandatory Annual Training – Part 2 Live
 - October 22, 2026 at 1pm
 - Attendance required for ALL HMIS end users
 - [Register at this link!](#)
- Part 1 and Part 2 must be completed by Friday, November 6



REMINDERS

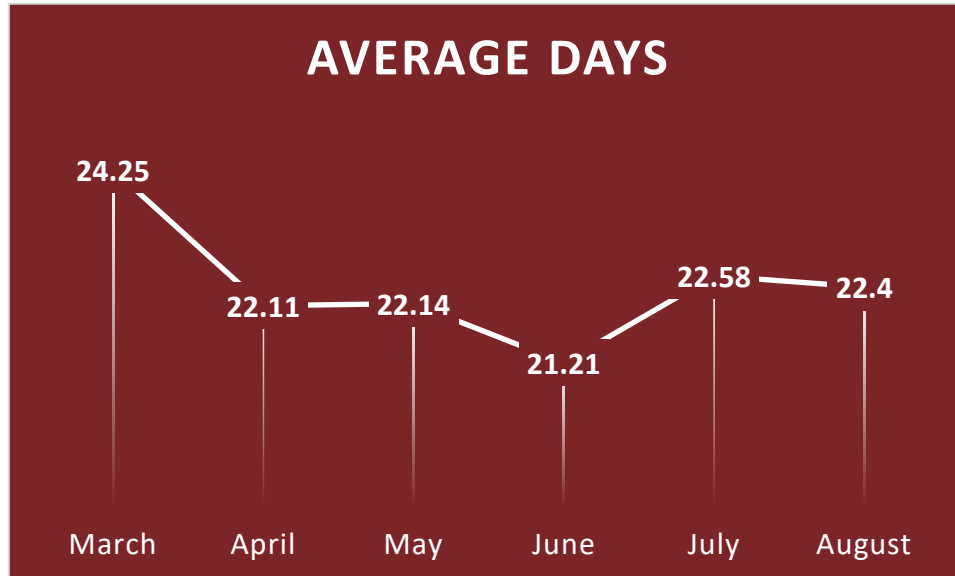
Be sure not to include PPI (personal protected information) when submitting help desk tickets.

It is best practice to use the client's ID number when submitting a ticket to the help desk; it protects client data and avoids confusion for clients with common names.

When submitting screenshots, be sure to black out or crop names, birth dates, SSNs, etc.

REMINDERS

Timeliness



The Data Quality Management Plan includes a timeliness benchmark of 24-72 hours, depending on project type. As a community, we need to make it a priority to reduce the delays in data entry so our system can function most effectively.

02

CLIENTTRACK FEATURE HIGHLIGHT

Favorites

CLIENTTRACK FEATURE: Favorites

1

What is it?

You can favorite specific pages and reports in ClientTrack, similar to how browser bookmarks function

2

How do you do it?

Visit the page or report you want to favorite, then select the star from the lefthand sidebar.

Select the page you want to add from the list of recent pages.

3

What should I favorite?

We strongly recommend favoriting the Paused Operations page and the Annual Assessment Tool

03

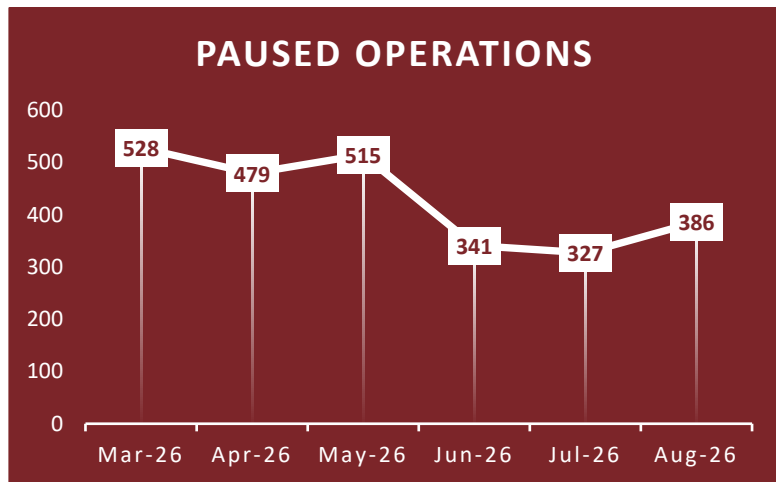
DEEP DIVE

Paused Workflows & Annual Assessments

PAUSED WORKFLOWS: OVERVIEW

WHAT IS IT?

When a workflow is started but not completed, it creates a Paused Workflow



Presenter: Emmett Altman

WHY DOES IT MATTER?

Impact on data quality:

If not addressed, the client will have missing data elements that are required for your project

Impact on reporting:

Missing data can result in errors in HUD reporting.

Impact on the people we serve:

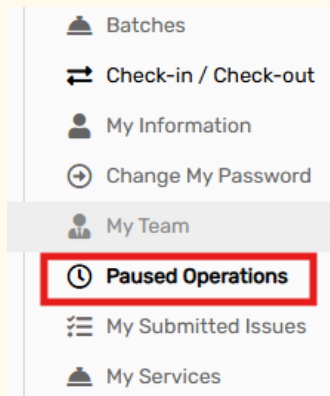
Without the missing information, we won't have a full picture of the client's situation and needs.

ACTIONS TO TAKE

1

Identify workflows you have paused

Go to My ClientTrack → Paused Operations.

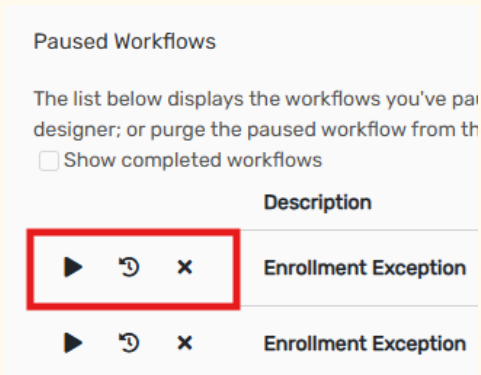


Who: Case Managers

2

Choose how to resolve

You can resume, restart, or delete the workflow



Who: Case Managers

3

Double check the enrollments

- Go to the client's dashboard and look at the enrollments
- Double check that all the dates are correct
- If an enrollment needs to be deleted, email the help desk

Who: Case Managers

ANNUAL ASSESSMENTS

WHAT ARE THEY?

- An Annual Assessment is a point-in-time assessment that is completed during a program enrollment
- Annual Assessments are required when a neighbor is enrolled in a program for a calendar year
- There is a 60-day window when Annual Assessments can be completed

WHY DO THEY MATTER?

Annual Assessments are a HUD requirement

If they are not completed, the missing data will be reflected in federal reporting and the work your program is doing will not be accurately captured.

Annual assessments are how we capture improvements in income, benefits, etc – we want the data to show the work you are doing!

ANNUAL ASSESSMENTS

CURRENT DATA

- Total number of missing annual assessments for all CoC projects since 10/1/25:

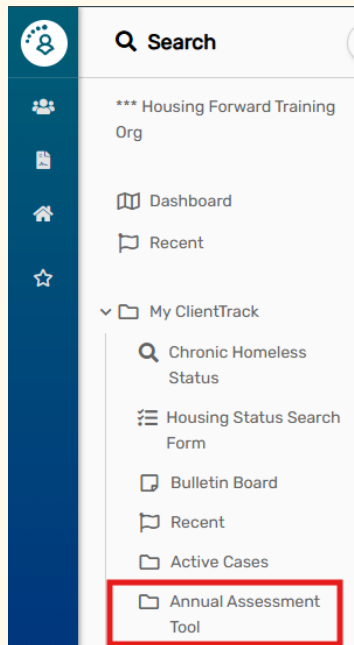
3394

WHY IS THIS HAPPENING?

What makes annual assessments difficult? If we know they are required, why are so many missing in our system?

USING THE ANNUAL ASSESSMENT TOOL

1 Navigate to the Tool



2 Set Filters

- Run the tool with the overdue box checked AND unchecked
- Filter by organization or project

The screenshot shows the filter settings for the Annual Assessment Tool. The 'Annual Assessments Due' field is set to '02/23/2026'. The 'Overdue Annual Assessments' checkbox is checked. The 'Organization' dropdown is set to '*** Housing Forward Training Org'. The 'Project' dropdown is set to '-- SELECT --'. The 'Funding Source' dropdown is set to '-- SELECT --'. The 'Client ID' field is empty.

3 Review the List

- Complete an assessment directly from the list OR
- Export the list to Excel for further review

The screenshot shows the 'HMIS Annual Assessment Tool' interface. It displays a table of assessment results with columns: Case Name, Client Name, Enroll ID, Project Name, Entry Date, Anniversary Date, Start of 60 Day Window, End of 60 Day Window, Days Enrolled, and Case Manager. The table shows three rows of data. The first row is for 'Evelash, 2' with Enroll ID 18567. The second row is for 'Evelash, 2' with Enroll ID 18566. The third row is for 'Tues, Tommy' with Enroll ID 18315. The 'Complete Annual Assessment' button is highlighted in blue.

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	
Evelash, 2	Evelash, 2	18566	ICA Test	10/23/2024	10/23/2025	09/23/2025	11/22/2025	488	
Tues, Tommy	Tues, Tommy	18315	ESD - HUD: Emergency Shelter Night-by-night	09/16/2024	09/16/2025	08/16/2025	10/16/2025	528	

04

PROVIDER SPOTLIGHT

PROVIDER SPOTLIGHT

Lisa Stephenson

- Empowerment Coach and Data Quality Officer for Home Point
- Coaches families in overcoming barriers to housing stability by identifying critical needs, connecting them to valuable resources, and helping them develop the skills necessary to maintain long-term housing success
- Has a Bachelor of Science in Health Administration from the University of Phoenix and extensive experience in housing services and substance abuse recovery
- A quote from Maya Angelou that inspires her: "You can only become truly accomplished at something you love. Don't make money your goal. Instead, pursue the things you love doing and then do them so well that people can't take their eyes off of you."
- Her personal motto: "I love the job I do because every day presents an opportunity to empower, encourage, and transform lives. Together, we are creating a more just, compassionate, and caring world."

Thanks Lisa, for all the work you do!



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.](#)

Questions? Feedback?

Thank you for joining Monthly Office Hours!

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

Mandatory Annual Training: October 22, 2026 at 1:00pm ([link](#))

Resources: [HMIS Documents](#)

