

## How to Guide

### Adding Notifications/Reminder Alerts

The **“Notifications”** feature in HMIS and DV ClientTrack can be used to set up **“Notifications and “Reminder Alerts”** in a client’s file **OR** under your user profile in HMIS or DV ClientTrack **OR** both. This function is especially helpful for assisting agencies with the timely completion of **“Annual Assessments”** and can also be used for setting up other reminders for case management meetings, groups, and appointments for the client.

***“An Income and Sources Assessment must be created as part of an Annual Assessment for clients participating in a project one year or more, even if there is no change in either the income or sources. 'Information Date' for those records must reflect the date of the data collection, which must be no more than 30 days before or after the anniversary of the head of household's Project Start Date. Annual assessments are based solely on the head of household's anniversary date. The annual assessment must include updating both the head of household's record and any other family members at the same time. If a client's income information was recorded incorrectly at project start, update, assessment, or exit, correct the existing record, rather than adding an “update” record.” (2022 HMIS Data Standards page 112)***

To create a **“Notification/Alert”** in a client’s file, go to the client’s dashboard. **Setting up “Notification/Alert” in a client’s file means the “Notification/Alert” will only be visible when you are logged in to that specific client’s record.**

The screenshot shows the HMIS Client Dashboard for Marta Merkel. The dashboard includes a search bar, a navigation menu on the left, and a main content area with client information and a table of enrollments.

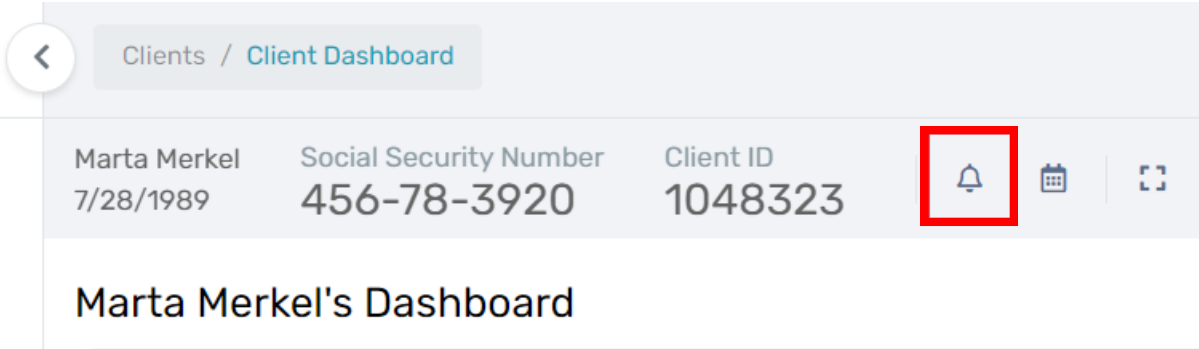
**Client Information:**

- Name: Merkel, Marta
- Gender: Female
- Ethnicity: Non-Hispanic/Non-Latin(a) (o)(x)
- Race: Black, African American, or African, Native Hawaiian or Pacific Islander, White
- Birth Date: 7/28/1989

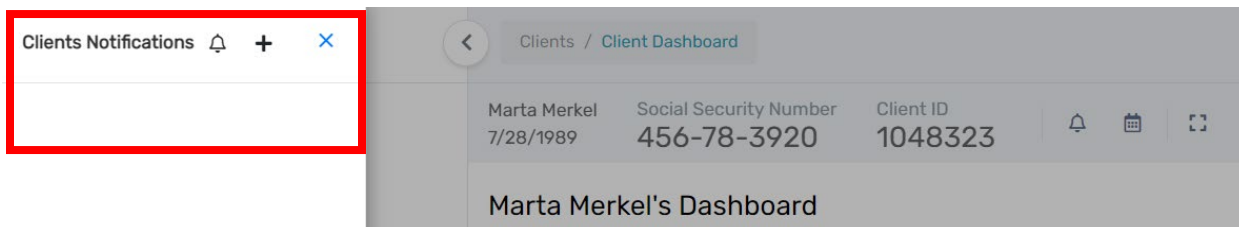
**Enrollments Table:**

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination
My Fake Organization Coordinated Entry (R1a)	1	11/07/2022			1971920		

1. Next, click on the **“Bell”** icon located to the right of the Client ID# at the top of the page

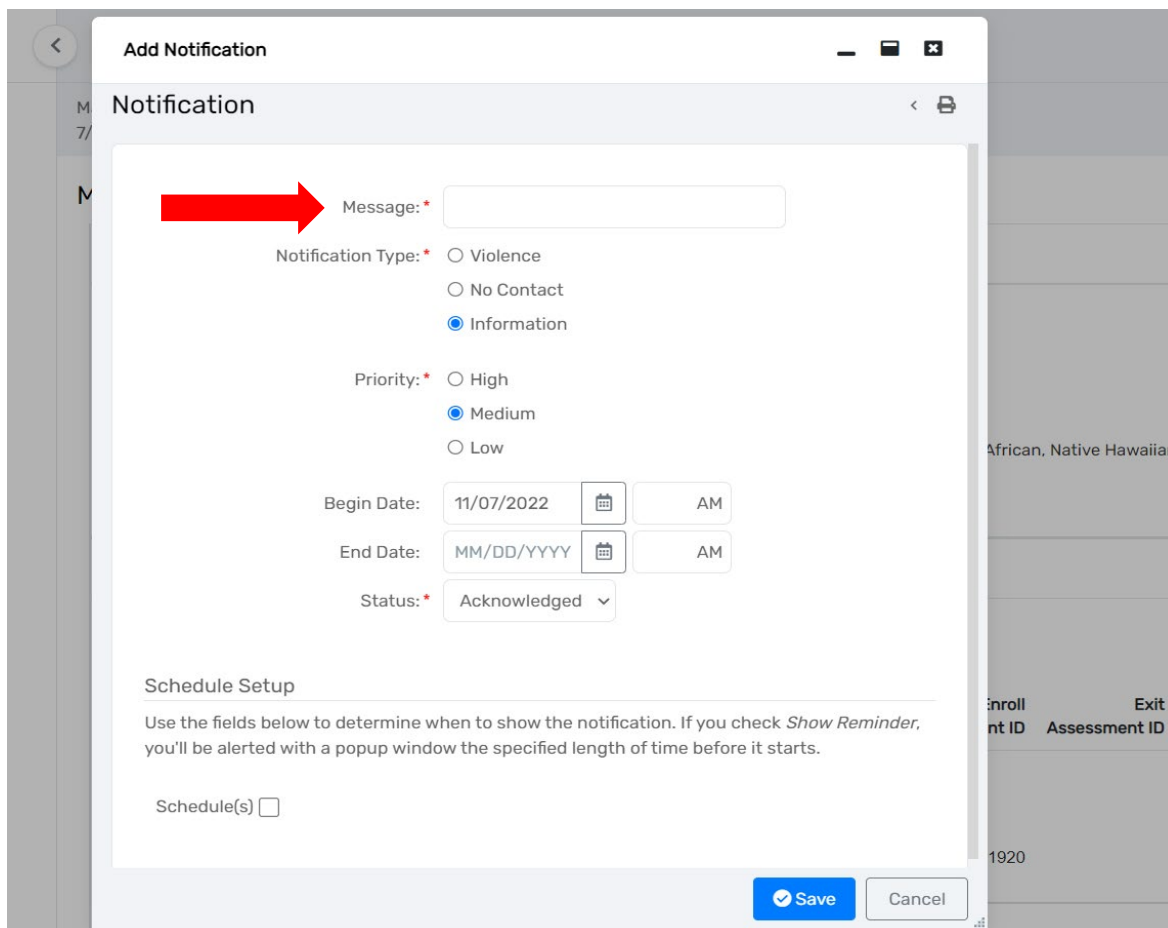


2. A window will appear as seen in the screenshot below.



3. Click on (+) for Add Notification

4. An additional window will appear as seen in the screenshot below.



5. In the **“Message”** field, type the title of the **“Notification”** (*Annual Assessment, etc.*)
6. Select the **“Notification Type”** (*Violence, No Contact, or Information*)
7. Select the **“Priority”** from the drop-down menu (*High, Medium, or Low*)
8. Type in the **“Begin Date”** and time (*AM or PM*) then type in the **“End Date”** and time (*AM or PM*) The **“Begin Date”** should be the date you would like for the system to begin sending you alerts on the Notification. For example, a **“Notification/Alert”** for an **“Annual Assessment”** should have a **“Begin Date”** of 30 days prior to the client’s 12-month anniversary of the client’s **“Project Start Date”**. The **“End Date”** for the **“Notification/Alert”** should be 30 days following the 12-month anniversary of the client’s **“Project Start Date”**. Please remember to allow for months with 30, 31 or 28/29 days when calculating this 60-day HUD required time frame for completing the **“Annual Assessment”**.

**The HMIS Data Quality Plan encourages sub-recipients to complete the required “Annual Assessment” using a 30-day window. This will ensure the assessment is completed within the HUD required 60-day window. This change was implemented due to the 60-day calculation errors when the window has both 30- and 31-day months. (Along with February which may have 28 or 29 days depending on Leap Year) By implementing a 30-day window for completing the required “Annual Assessment”, sub-recipients will know they have met the HUD required timeframe for the Annual Assessment. If you have questions regarding the HMIS Data Quality Plan, please email your respective helpdesk for assistance.**

9. Select the **“Status”** from the drop-down menu (*New/Pending, Acknowledged, Complete, or Canceled*) Always select **“New/Pending”** when setting up a new **“Notification/Alert”**.

10. Next, scroll down to the **“Schedule Setup”** section of the pop-up box and click the **“Schedule(s)”** checkbox.
11. The **“Alert”** will begin popping up on the client’s record on the **“Begin Date”** you previously entered. You can change the time in the **“Alert”** fields along with the **“Duration”** of the **“Alert”** field.
12. Click the **“Show Reminder”** drop-down to select how often you would like the **“Alert”** to pop-up on your screen.
13. Click **“SAVE”** in the bottom right corner of the window.

### Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you’ll be alerted with a popup window the specified length of time before it starts.

Schedule(s)

Time:    to  Duration:

+

Show Reminder:

**Add Notification** \_ ☐ ✕

**Notification** < 📄

● Information

Priority: \*  High  
 Medium  
 Low

Begin Date:

End Date:

Status: \*

**Schedule Setup**

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you’ll be alerted with a popup window the specified length of time before it starts.

Schedule(s)

Time:    to  Duration:

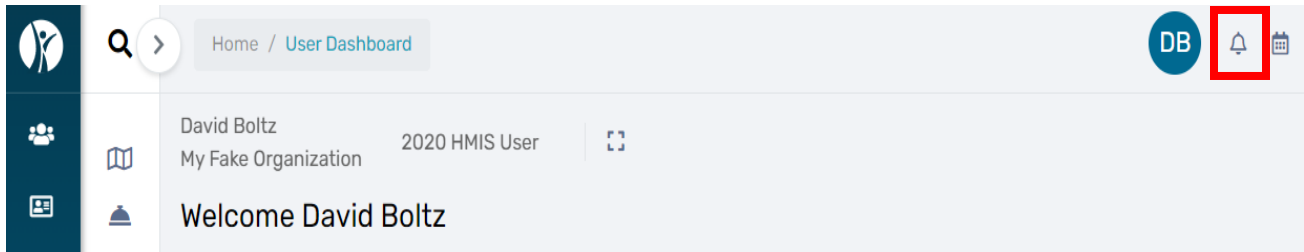
+

Show Reminder:

- 5 minutes
- 10 minutes
- 15 minutes
- 30 minutes
- 1 hour
- 2 hours
- 4 hours
- 8 hours
- 0.5 days
- 1 day
- 2 days
- 3 days
- 4 days
- 1 week
- 2 weeks

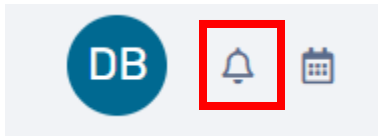
You have successfully added a “Notification/Alert” in the client’s HMIS or DV ClientTrack file. The system will begin displaying a reminder alert (window) on the “Begin Date” entered for the Notification.

**To create a “Notification/Alert” under your user profile, go to the upper right corner of the screen.**

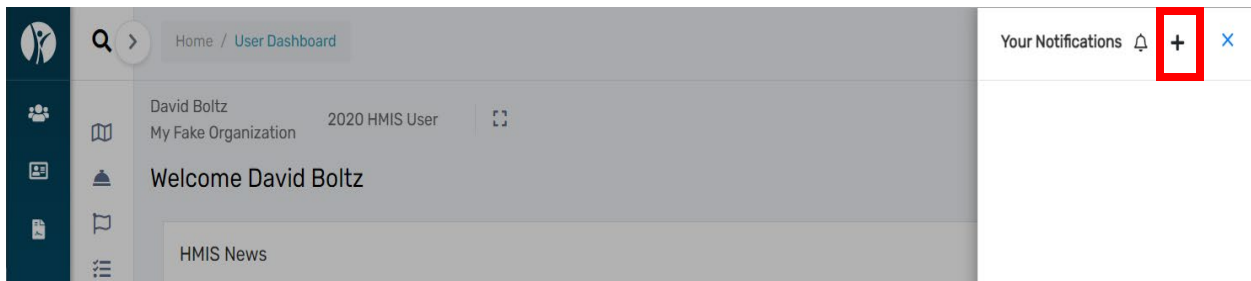


**Creating the “Notification/Alert” under your user profile will ensure the “Notification/Alert” appears as a reminder no matter what Client record you are working in or viewing in the system. Whereas, creating the “Notification/Alert” under the Client’s record will only allow the reminder to appear when you are logged into that specific Client’s record. We recommend setting up the “Notification/Alert” under both the Client’s record AND your user profile.**

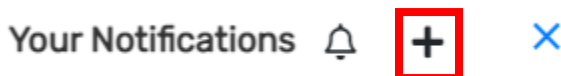
- Next, click on the “Bell” icon located to the right of your initials as displayed below.



- A window will appear as seen in the screenshot below.



- Click on “+” Add Notification



- An additional window will appear as seen in the following screenshot.

- In the “**Message**” field, type the title of the “**Notification**” (***Annual Assessment Client ID#1234567, etc.***) ***Be sure to include the Client ID# for the Annual Assessment in the “Message” field.***
- Select the “**Notification Type**” (*Violence, No Contact or Information*)
- Select the “**Priority**” from the drop-down menu (*High, Medium, or Low*)
- Type in the “**Begin Date**” and time (*AM or PM*) then type in the “**End Date**” and time (*AM or PM*) The “**Begin Date**” should be the date you would like for the system to begin sending you alerts on the Notification. For example, a “**Notification/Alert**” for an “**Annual Assessment**” should have a “**Begin Date**” of 30 days prior to the client’s 12-month anniversary of the client’s “**Project Start Date**”. The “**End Date**” for the “**Notification/Alert**” should be 30 days following the 12-month anniversary of the client’s “**Project Start Date**”. Please remember to allow for months with 30, 31 or 28/29 days when calculating this 60-day HUD required time frame for completing the “**Annual Assessment**”.

- The HMIS Data Quality Plan encourages sub-recipients to complete the required **“Annual Assessment” using a 30-day window**. This will ensure the assessment is completed within the HUD required 60-day window. This change was implemented due to the 60-day calculation errors when the window has both 30- and 31-day months. (Along with February which may have 28 or 29 days depending on Leap Year) By implementing a 30-day window for completing the required **“Annual Assessment”**, sub-recipients will know they have met the HUD required timeframe for the Annual Assessment. If you have questions regarding the HMIS Data Quality Plan, please email your respective helpdesk for assistance.
- Select the **“Status”** from the drop-down menu (New/Pending, Acknowledged, Complete, or Canceled) Always select **“New/Pending”** when setting up a new **“Notification/Alert”**.

- Next, scroll down to the **“Schedule Setup”** section of the pop-up box and click the **“Schedule(s)”** checkbox.
- The **“Alert”** will begin popping up on the client’s record on the **“Begin Date”** you previously entered. You can change the time in the **“Alert”** fields along with the **“Duration”** of the **“Alert”** field.
- Click the **“Show Reminder”** drop-down to select how often you would like the **“Alert”** to pop-up on your screen.
- Click **“SAVE”** in the bottom right corner of the window.

## Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.

Schedule(s)

Time: 05/15/2023  09:30 AM to 10:00 AM Duration: 30 minutes

+ Show Reminder:  0.5 hours

**Add Notification**

Notification

Information

Priority: \*  High  
 Medium  
 Low

Begin Date: 05/15/2023 10:30 AM

End Date: 07/15/2023 10:30 AM

Status: \*

Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.

Schedule(s)

Time: 05/15/2023  10:30 AM to 10:30 AM Duration: 30 minutes

+ Show Reminder:  0.5 hours

5 minutes  
10 minutes  
15 minutes  
30 minutes  
1 hour  
2 hours  
4 hours  
8 hours  
0.5 days  
1 day  
2 days  
3 days  
4 days  
1 week  
**2 weeks**

Save

- You have successfully added a **“Notification/Alert”** under your user profile in HMIS or DV ClientTrack file. The system will begin displaying a reminder alert (window) on the **“Begin Date”** entered for the Notification.

Please email your respective helpdesk if you need additional assistance.

[DVHelpDesk@ihcda.IN.gov](mailto:DVHelpDesk@ihcda.IN.gov)

[HMISHelpDesk@ihcda.IN.gov](mailto:HMISHelpDesk@ihcda.IN.gov)