

How to Guide

Adding Notifications/Reminder Alerts

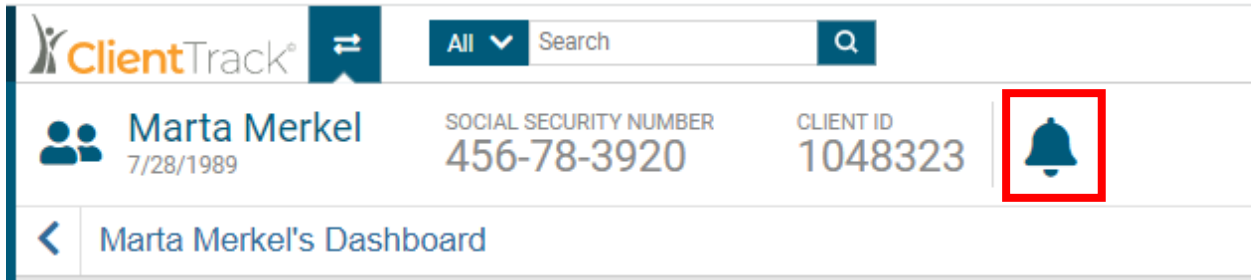
The “**Notifications**” feature in HMIS and DV ClientTrack can be used to set up “**Notifications** and “**Reminder Alerts**” in a client’s system file. This function is especially helpful for assisting agencies with the timely completion of “**Annual Assessments**” and can also be used for setting up 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)

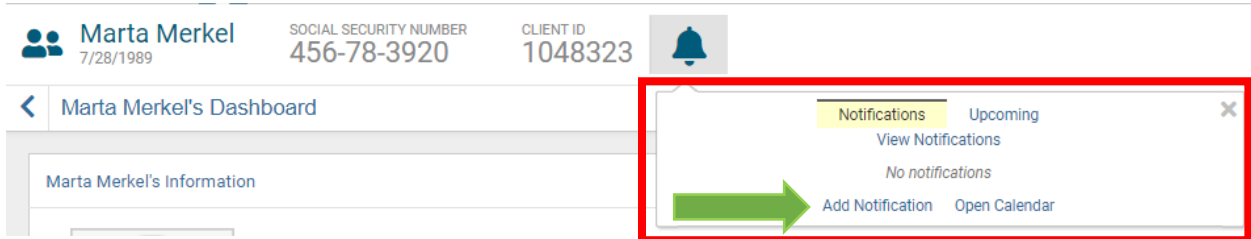
To create a “**Notification/Alert**” in a client’s file go to the client’s dashboard.

The screenshot displays the ClientTrack interface for a client named Marta Merkel. The left sidebar contains navigation options such as Client Dashboard, Find Client, Intake, COVID-19 Intake, Client Profile, Edit Client, Address History, Alias History, Case Managers, Case Notes, Client Files, Family Members, Interested Others, Living Situation, Notifications, Client Photo, Veteran Information, and Paused Workflows. The main content area shows the client's information, including Name (Merkel, Marta), Gender (Female), and Ethnicity (Non-Hispanic/Non-Latin(a)(o)(x)). Below this, there is a table for Marta's Enrollments, which lists an active enrollment in an Emergency Shelter named 'My Fake Organization ES (ES-R8)' with 2 case members and a project start date of 06/14/2022. The Case Manager Assignments section shows Lori Wood as the case manager, also with a begin date of 06/14/2022. The bottom section is labeled 'Marta's Services'.

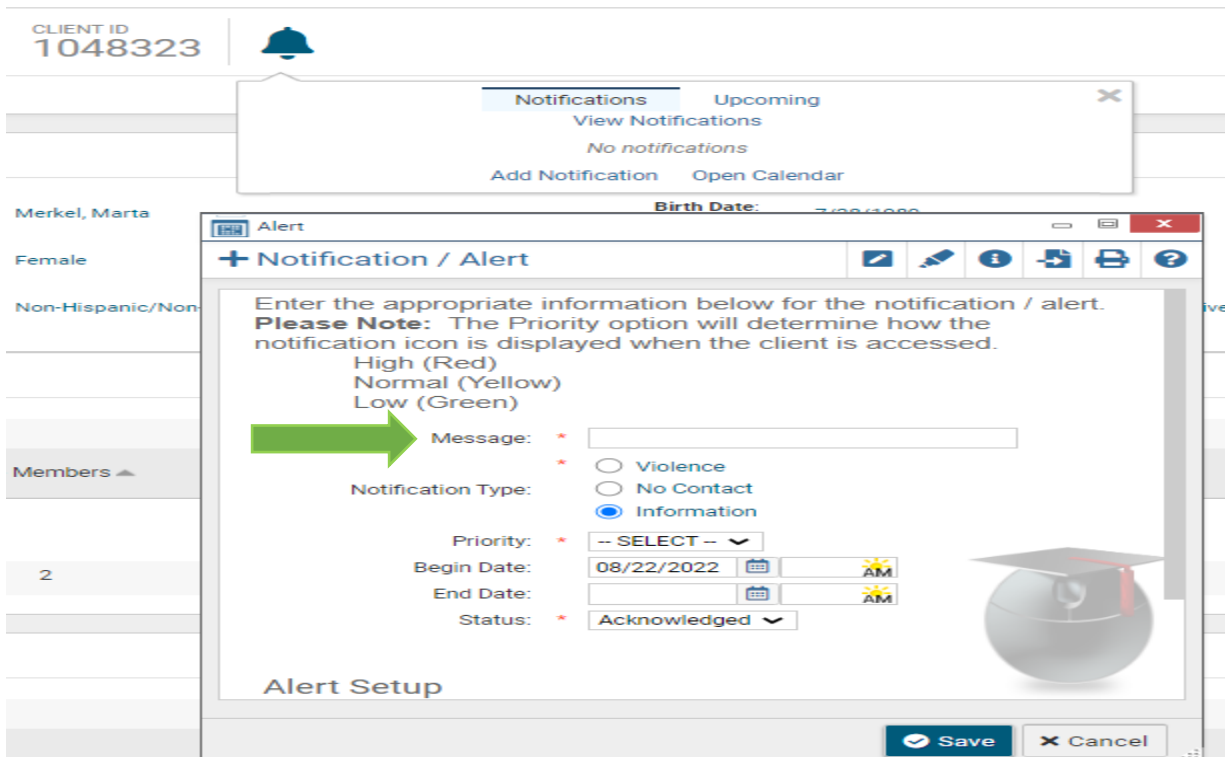
1. Next, click on the “Bell” icon located to the right of the Client ID# at the top of the page



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



3. Click on “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.*

DVHelpDesk@ihcda.in.gov

HMISHelpDesk@ihcda.in.gov

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”**.

Alert

+ Notification / Alert

Enter the appropriate information below for the notification / alert.
Please Note: The Priority option will determine how the notification icon is displayed when the client is accessed.
 High (Red)
 Normal (Yellow)
 Low (Green)

Message: * Annual Assessment

Notification Type: *
 Violence
 No Contact
 Information

Priority: * High

Begin Date: 05/15/2023 08:00 AM

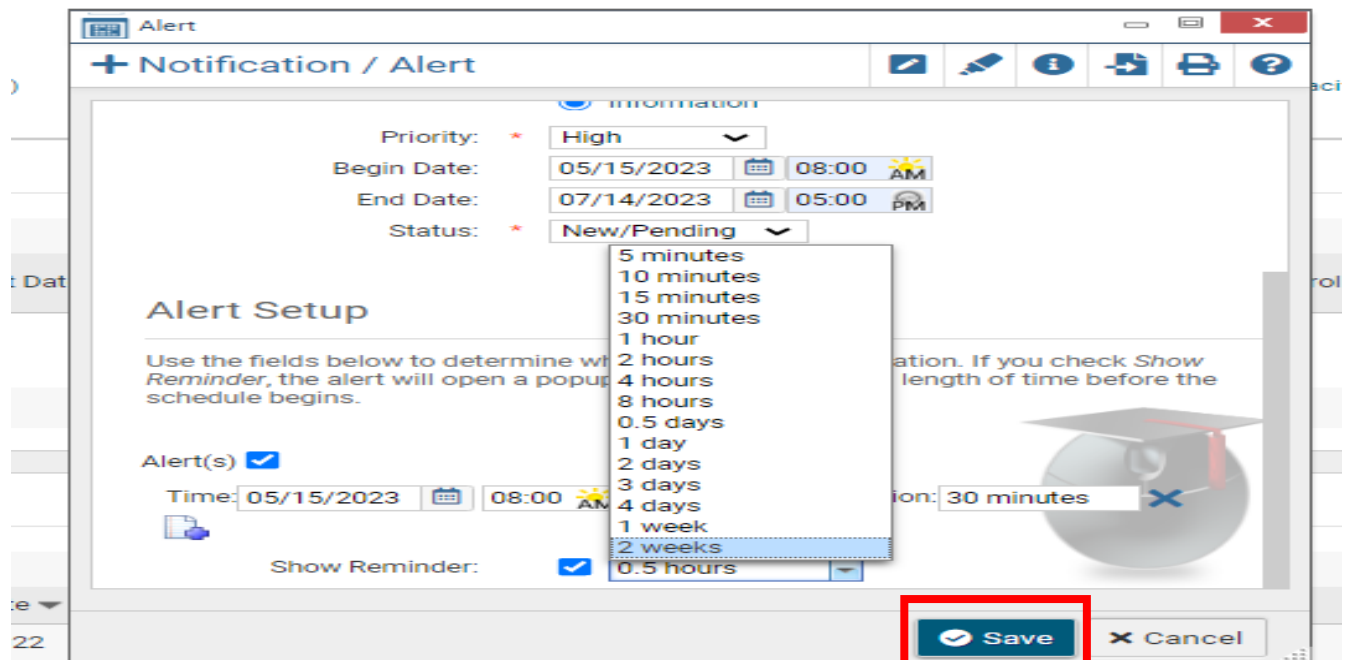
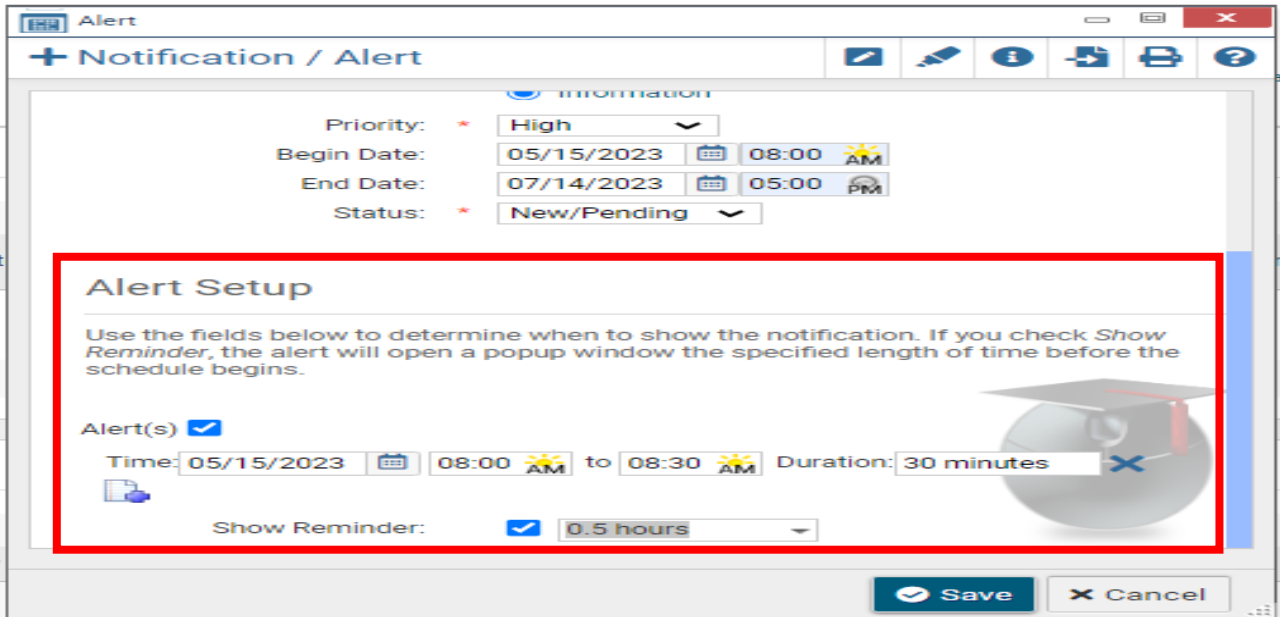
End Date: 07/14/2023 05:00 PM

Status: * New/Pending

Alert Setup

Save Cancel

10. Next, scroll down to the **“Alert Setup”** section of the pop-up box and click the **“Alert(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.



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.

Please email your respective helpdesk if you need additional assistance.

DVHelpDesk@ihcda.in.gov

HMISHelpDesk@ihcda.in.gov