

Homeless Management Information Services (HMIS) Self-Test

The questions below are intended for self-assessment. This brief test identifies key tasks within HMIS that each user must know, to properly navigate the system and contribute quality data. Mastery of these foundational skills allows for more advanced work and self-resolution of issues in the database.

Assessment solutions start on the next page.

You may also be interested in the HMIS Data Entry Manual, 5th Edition available on our website:

<https://snohomishcountywa.gov/DocumentCenter/View/6528/HMIS-Data-Entry-Manual---2017-Standards-Revision-?bidId=>

Assessment Questions

- 1) I know how to **search** for my client in the database.
- 2) My client needs me to **update** their personal information, and I can do so without assistance.
- 3) I am able to **enroll** my client in a new housing program.
- 4) **Case notes** – I am able to add a new note or edit an existing note that I wrote.
- 5) I can show other users how to log **services** related to an open enrollment.
- 6) When my client leases up, I know how to go back and add the correct **move-in** date.
- 7) After participation in a program ends, I know how to **exit** a household.
- 8) I know how to submit a **Help** request within ClientTrack.
- 9) When an HMIS administrator responds to my Help request, I know how to **view** their reply.
- 10) For data to be considered **timely**, I know that all my work must be entered in the database within ____ calendar days.

Assessment Solutions

- 1) I know how to **search** for my client in the database.

Solution: Under the CLIENTS workspace, use the magnifying glass icon in the upper left-hand corner. For best results, enter only a partial first and last name. This will assist in finding the client if they are in the database with a shortened or misspelled name.

Example: Search by “Mi Jon” instead of Michael Jones, as they might be in the systems as Michael, Mical, Mike, etc.

- 2) My client needs me to **update** their personal information, and I can do so without assistance.

Solution: At your client’s dashboard, click the link directly above the profile picture. Example, “Michael Jones’ Information.” This will take you to the client information screen where you may update their demographic details and release of information before saving your work.

- 3) I am able to **enroll** my client in a new housing program.

Solution: From the head of household’s dashboard, click the Intake button on the upper left hand side. This will start the enrollment workflow. At the HUD Program Enrollment screen, you may select the housing program for enrollment, prior to finishing the workflow in full.

- 4) **Case notes** – I am able to add a new note or edit an existing note that I wrote.

Solution: From the head of household’s dashboard, expand the left hand pane. Here you will see the Case Notes icon. Click this and select “Add New Case Note” to write a new case note. To edit a pre-existing case note, click the blue action gear next to the case note and then select “Edit Case Note.”

5) I can show other users how to log **services** related to an open enrollment.

Solution: **Partial trick question – only users who have access to the database should be shown anything in the database.** From the head of household’s dashboard, if there is a current enrollment, click the Services link. At the Client Services screen click “Add New.” The Service screen appears. Working from the top down, select the grant name the service will be billed to, the enrollment, the service, and then the number of units for that service. Such as \$25 for gasoline voucher.

6) When my client leases up, I know how to go back and add the **move-in** date to an enrollment

Solution: From the head of household’s dashboard, click the blue action gear next to the open housing enrollment. Select “Add Housing Move-In Date.” This will navigate you to the HUD Program Enrollment screen. To the far right is the Housing Move-In Date field, add the date under the head of household’s record and click Save at the bottom to save the record.

7) After participation in a program ends, I know how to **exit** a household.

Solution: From the head of household’s dashboard, click the blue action gear next to the enrollment that is to be exited. Select “Exit the Enrollment.” This will start an exit workflow that is similar to the enrollment workflow.

8) I know how to submit a **Help** request within ClientTrack.

Solution: At the upper right hand side of every screen is the Help link. Click this and then select, “Report an issue.” This is similar to sending an email. Please cite the client ID in the “Summary” line, the nature of the problem, and the expected vs. unexpected outcomes.

9) When an HMIS administrator responds to my Help request, I know how to **view** their reply.

Solution: From the HOME workspace, at the left-hand pane, select MY CLIENTTRACK. Click the icon, “My Submitted Issues.” Filter in closed issues. Click the pencil icon to read replies or write a reply.

10) For data to be considered **timely**, I know that all my work must be entered in the database within _____ calendar days.

Solution: As stated in our HMIS Policies and Procedures Manual on page 56, you have five (5) calendar days to enter data. Ideally data entry occurs on the same day the event occurs.

Source: <https://snohomishcountywa.gov/DocumentCenter/View/6532/HMIS-Policies-and-Procedures-?bidId=>