**FAQs for GA HMIS End Users**

1. How do I start the process of training and signing my EUPA form?

**A:** The initiating process for new users is initiated by the Agency Administrator of the organization. They will complete the EUPA form and validate it, it then goes to the COC Administrator for their validation and then the End User for their acknowledgment. Once that process is completed, the COC Administrator creates their account in the training platform in TalentLMS.

1. How do I set up my ClientTrack account?

**A:** Your ClientTrack account is created by the HMIS Lead Team, once all baseline training is completed and the EUPA form is submitted and validated. The account is created, and account credentials are sent to the user.

1. What is the ClientTrack website link?

**A:** <https://clienttrack.eccovia.com/login/GHFA_HMIS>

1. What is the TalentLMS website link?

**A:** <https://ghfa.talentlms.com/index>

1. Is there required training for new users?

**A:** All new users are required to complete baseline training courses 00-20 in TalentLMS.

1. How often do I need to log in/use ClientTrack?

**A:** ClientTrack Automates inactivating accounts that have not had any activity for 60 days. In addition, Users are required to retake courses 4-20 if the login activity duration is 6 months or longer and **60 days for BOS COC GA-501.**

1. How do I reset my ClientTrack password?

**A:** You can reset your password if a security question is established when you first logged in. If not, you will have to contact your COC HMIS Administrator for further assistance.

1. How do I reset my TalentLMS password?

**A:** You can reset your password by using the forgot my password function inside of the TalentLMS Platform.

1. I’m locked out of ClientTrack, how do I unlock my account?

**A:** Your account can be locked for numerous reasons. However, the most common occurrence is for lack of being active in your account for longer than 60 days or from too many failed attempts of trying to log in by using the wrong password which normally lasts for a duration of 30 minutes to an hour. Then it will allow you to try and log in again after the time has passed. However, If the problem persists longer than that, please contact your COC HMIS Administrator for further assistance. For lack of account activity, you will have to contact your COC HMIS Administrator for further assistance.

1. I’m locked out of TalentLMS, how do I unlock my account?

**A:** If you are locked out of your TalentLMS Account and the “forgot password” function is not allowing access, you must contact your COC HMIS Administrator for further assistance.

1. Do I need to complete baseline training if I’m only running reports in the system?

**A:** No, you do not have to complete baseline training. We have a “Read-Only” account for users who only need this permission level to complete their responsibilities. The training for “Read-Only” permission is embedded inside the EUPA form for this level of access.

1. What is the difference between “Read-Only” and “Read-Write” permissions?

**A:** **HMIS End User**: This track is intended for users who actively input data into the HMIS system. Users in this role typically have permission to create, edit, and input data into the system as part of their regular duties.

**HMIS End User (Read-Only)**: The HMIS End User (Read-Only) track is designed for users who do not actively input data into the HMIS system but require access for monitoring and reporting purposes. Users in this role have restricted permissions and can only view data without the ability to make changes or input new information into the system. In addition, users following this track do not have to complete baseline training in TalentLMS. Their training is embedded in their EUPA form.

1. How does an organization get added to the HMIS database (ClientTrack)?

**A:** For an organization to become a participating organization in ClientTrack, they must first contact their local COC HMIS Administrator for their geographical location initiate and approve the request. Upon approval, the ED will submit an APA (Agency Participation Agreement Form). Once it is submitted and reviewed by the HMIS Lead, the organization will then be added to ClientTrack and notified of the addition by their COC HMIS Administrator.

1. How does a user become an Agency Administrator?

**A:** For a user to become an Agency Administrator, the user must first submit an issue ticket inside of ClientTrack requesting this user permission. Once the ticket is received it is assigned to the user’s COC Administrator to contact the ED to validate the request. (Soon we will roll out an Agency Administrator Request Form that will be initiated by the ED to streamline this process)

1. How does a user have a project created in the system?

**A:** “Project Set-Up Requests” are submitted by the Agency Administrator of the requesting organization. Once the form is completed in its entirety, the HMIS Lead will send to the COC HMIS Administrator for validation and creation of the project ClientTrack.

1. How does a user client reverse an accidental exit of a client?

**A:** A user can re-enter a client enrollment within 90 days following an exit by clicking the three dots to the left of the enrollment and select "Re-enter Enrollment". This will remove the exit date and exit assessment. If it is outside of the 90-day window, you must submit an issue ticket in ClientTrack.

1. How does a user delete an enrollment from a project?

**A:**  A user can delete an enrollment by selecting the client dashboard, and then clicking on the three dots by the project name. Then select view case members. You can delete members of the household from this screen by clicking on the trash icon by each client’s name.

1. How is the Primary COC for organizations established inside of ClientTrack?

**A:** The primary COC for organizations in ClientTrack is determined by the organization's geographical location and/or its primary COC funding source.

1. How does a user properly submit an issue ticket Inside of ClientTrack?

**A:** **Accessing the Help Link**

* **Location:**
  + Lower left corner of the ClientTrack screen.
* **Options Available:**
  + "Report an Issue"
  + "Request Assistance"

**: Reporting an Issue**

* **Step 1:** Click on “Report an Issue” from the Help menu.
* **Step 2:** Enter a concise Subject/Summary.
* **Step 3:** Provide detailed specifics in the body of the issue statement.
  + **Tip:** Include all relevant details to minimize follow-up questions.

**Key Points for Issue Submission**

* **Specificity:**
  + Clearly describe the problem.
  + Example: "Unable to update client record - error message XYZ."
* **Client Identification:**
  + Use the unique Client ID from the Client Dashboard.

1. Why is my Q3 UDE “Disabling Condition” error rate so high on my DQR?

**A:** This error rate is typically high due to a user selecting that the client has a disabling condition in the intake workflow, but not selecting a barrier and continuing through the intake workflow. This can also happen if a barrier is selected, but the question about if the condition is indefinite and substantially impairs the client’s ability to live independently is not also marked as “yes”.

1. I found out a client has an existing profile in ClientTrack, and I need to merge the two Client profiles. How do I resolve this issue?

**A:** Yes, ClientTrack does merge duplicate clients. However, for ClientTrack to automatically merge clients, the spelling of the full name, SSN, and DOB must match. Note: if one client ID has a middle name and the other doesn’t, they will not merge. If one ID has a full social, but the other has the last four, they will not merge until they match. If there is a client that you may think needs to be merged and ClientTrack has not automatically merged the two clients. Please submit a ticket inside of ClientTrack and list the two or more Client ID numbers. The ticket will be assigned to your COC Admin for further assistance.

1. How do I change my name and/or email address in ClientTrack and TalentLMS?

**A:** If you need to change your name and/or email address in ClientTrack. You would select “My ClientTrack” at the bottom left of the home workspace, and then select my information. There you will see your account name and email address information. There is a question at the bottom of this screen asking if you want to change the information on the screen. If you select “Yes”, a link to the “ClientTrack and TalentLMS Name and Email Address Change Request Form” will pop up. Once you complete this form it is sent to your COC HMIS Administrator to update your account.

1. I completed an annual assessment, but the DQR is still showing a missing error.

**A:** Annual Assessments must be completed 30 days before or after the year mark of client enrollment for the assessment to be pulled in. Also, it’s possible that you did the assessment within that range, but your report date range ends before you completed the assessment. For example, you completed the assessment on 1/1/24 but your report range ends on 12/31/23. The assessment date must be within the report parameters to be pulled in and accounted for.

1. I completed the income assessment at the start or exit, but it is showing up on the DQR as an error.

**A:** The error is almost always that the date of the income assessment does not match the date of enrollment. These must match or the system will not pull in the assessment. This happens often when data entry occurs after the date of enrollment and users forget to backdate assessments. To fix this, you would go into the appropriate enrollment or exit workflow and correct the dates.

1. I completed training for CE, but I do not have CE access.

**A: (For BOS COC GA-501 and Atlanta COC GA-500)** You must submit an issue ticket stating that you completed the CE training as well as which CE you need access to. For all other users belonging to other COC’s please check with your COC Administrator for your COC’s CE access requirements.

1. I need to correct the enrollment date of the client in my project.

**A:** You will need to select the three dots beside the project enrollment you wish to edit, and then select Edit Project Enrollment Workflow. You will click through each assessment and change all of the dates to the correct date including on the project enrollment page.

1. I need to correct the discharge date of a client.

**A:** You will need to select the three dots beside the project enrollment you wish to edit, and then select Edit Exit Workflow. You will click through each assessment and change all of the dates to the correct date including on the project enrollment page.

1. The numbers on Q1 of my DQR do not match each other.

**A:** The two listed numbers on Q1 of the DQR can potentially be different in Street Outreach and Emergency Night by Night Shelter projects. This can be caused by a couple of things. First, a client in Street Outreach must have a date of engagement (DOE) entered on the project enrollment page to be pulled into the DQR. Because of the transient status of the project’s enrollments, HUD does not expect all Street Outreach clients to immediately agree to case management and therefore does not count clients that are not actively engaged in case management for data quality purposes. Date of Engagement means that the client is willing to participate in case management and therefore expected to give information on themselves to the case worker. Because of the DoE requirement, children will not appear in the report because children do not have DOEs.

1. The DQR is saying that I have inactive clients in Q7. How do I fix this?

**A:** In street outreach projects, caseworkers are expected to collect a current living situation every time they meet with the client. If a client goes 90 days without a current living situation, the system will not consider them to be active in the project.

1. I have enrolled a client in the wrong project, how do I fix it?

**A:** You will need to delete all the family members from the wrong project and enroll in the correct project. To Delete: Click the three dots next to the project, then select View Case Members. There you will see all of the members enrolled for this enrollment. Use the trash can to delete. Then you can enroll them in the correct project. Remember to backdate to the original enrollment date.