

Help Center

The most common way to get help with ClientTrack is to contact the HMIS Systems Team at hmis@changinghomelessness.org. No Personally Identifiable Information (PII) is allowed to be sent via email. However, submitting an issue via ClientTrack's Help Center* is also an option for all users.

** See Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/How to Submit an Issue Ticket for instructions on how to submit Issues tickets.*

When requesting changes in the HMIS inbox or via ClientTrack's Help Center, please be sure to include fundamental information.

For example, a request for an enrollment change can include,

1. The client number, aka, HMIS/ClientTrack ID # (do not include any PII {personal identifiable information} in unencrypted emails).
2. Original enrollment type - Example - "CoC FL-510 Coordinated Entry"
3. Enrollment change request name - Example - "HP FL 510 SSVF Intake Navigation Prevention"
4. Enrollment start date
5. Change requested and why

Including information in the example above helps prevent accidental mistakes such as, but not limited to:

- Typos in an HMIS # resulting in the wrong client being referenced.
- Enrollment change requests that are requested for incorrect reasons.

Requests are typically acknowledged within 72 hours.

It is important for users to follow up on any issues submitted* in a timely manner.

** See Chapter 3: Home Workspace: Menu Options, Folders and subfolders/My Submitted Issues: Subfolder/Steps to Respond to Tickets in My Submitted Issues for instructions on how to respond to My Submitted Issues tickets.*

How to Submit an Issue Ticket

Tips and Tricks - Submitting tickets - Omitting PII (Personally Identifiable Information)



Submitting identifying data (SSN, DOB, etc.) into the text of the Issue Ticket is a potential HIPAA violation. The reason for this is that notifications are e-mailed out. Instead, as with all external communication regarding HMIS clients, use the Client ID. This is enough information to allow the Systems Team to locate a specific client record.

Submitting Tickets and PII (Personally Identifiable Information)

Steps to submit a new Issue Ticket via ClientTrack

Step 1: Click on the “Help” icon* at the bottom of the sidebar**. If an issue is regarding a ClientTrack feature, click the “Help” icon on the page that you are having an issue with.

** To view a list of icons and buttons used in Client Track HMIS, see Chapter:1: HMIS ClientTrack Basics/Key Terminology and Navigation/Icons and Buttons in the “HMIS Basic User 2025 Manual”.*

*** For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

training trainer

Community Practice Collaborative

- ESHC HMIS Programs

Home / Welcome training trainer

tt

Search

Home

User Dashboard

> Standard Reports

> My ClientTrack

> HMIS Reports

Bulletin Board

...

HMIS Office Hours

5/29/2024 8:21:00 AM

training trainer

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...

[Read More](#)

Current Program Enrollments

...

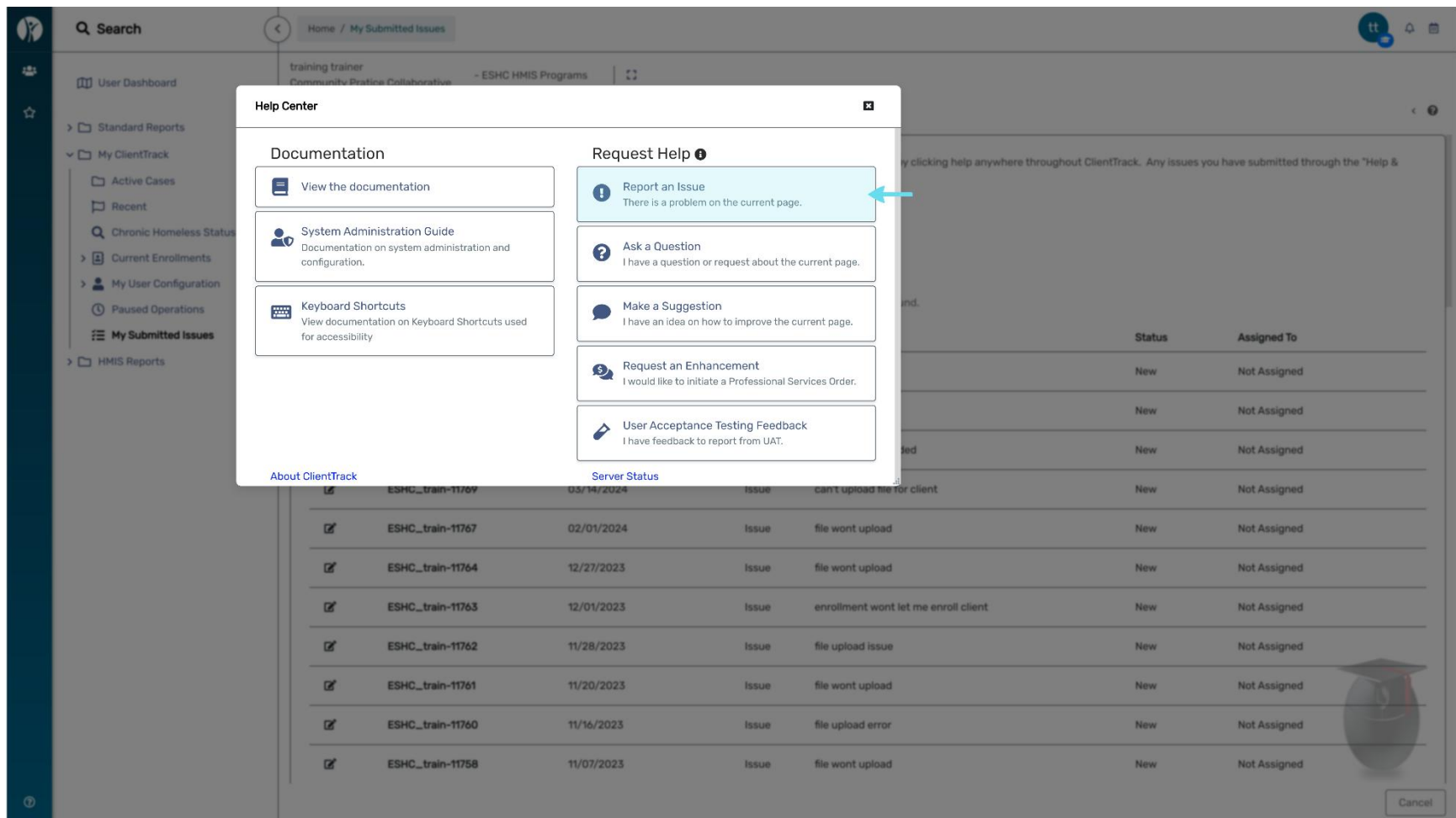
ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	40	60
CoC FL-510 Street Outreach	4	11
COJ- CV ESG HP 2021-2022	4	4
CPC Diversion	1	1
DCF - ESG - CV Navigation	2	2
EFSP - Phase 41	1	1
ESG - Emergency Rental Assistance Program	4	8

Help (Submit tickets)

Comments

...

Step 2: In the pop-up box that appears, click on “Report an Issue”.



Help – Report an Issue Pop-Out Window

Step 3: A “Report an Issue” pop-up window will appear. Fill out the “Report an Issue” form as applicable. If the issue concerns a client(s), use only the client ID as an identifier. Required elements are marked with a (*).

Font, etc. color

Recent color

Font

Clear font

Underline

Italic

Bold

Header style

Link

Picture

Full Screen

Help

Bullets

Numeric Order

Paragraph

Table

Report an Issue

Enter a summary of your issue *

The summary helps to quickly identify your issue when you're referring back to it later.

Please describe the issue

B

I

U

Rubik ▾

A ▾

☰ ▾

☷ ▾

☰ ▾

☷ ▾

🔗

🖼️

🗑️

?

Please enter any details that might help describe the issue or might help in solving it.

[Click here to attach a file or drag-and-drop](#)
[View Debug Information](#)

How can we reach you?

Email Address * training@eshc.org

Phone Number * 904-555-1100

[Notify additional people](#)

Submit

Cancel

Report an Issue Format Buttons

Step 5: (Optional but recommended for more complex issues) Attach a file or screenshot to the issue ticket by clicking on the “Click here to attach a file or drag-and-drop” link. When clicking “Click here to attach or drag-and-drop”, a dialogue box will open to select a previously captured image from a local source (computer). The file name of the picture you selected should appear in the “File Name” field. Then click “Open”

A file can be dragged-and-dropped to any location within the “Report an Issue” container space.

More than one file can be added by clicking “Attach another file” and repeating Step 4.

Step 6: The user’s HMIS registered e-mail and phone number will automatically populate in the “How can we reach you” section. Verify this information is correct or edit as needed.

Step 7: If applicable, add other people that need to be included on progress on this Issue Ticket by clicking on “Notify Additional People”.

The screenshot shows a 'Report an Issue' form with the following sections and annotations:

- Summary:** A text box labeled 'Enter a summary of your issue *'. Below it, a note states: 'The summary helps to quickly identify your issue when you're referring back to it later.'
- Description:** A section titled 'Please describe the issue' containing a rich text editor with various formatting tools (bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent, link, unlink, help). Below the editor is a text box labeled 'Please enter any details that might help describe the issue or might help in solving it.' and a link: 'Click here to attach a file or drag-and-drop'.
- Contact Information:** A section titled 'How can we reach you?' containing two text boxes: 'Email Address *' (with the value 'training@eshc.org') and 'Phone Number *' (with the value '904-555-1100').
- Additional People:** A link labeled 'Notify additional people'.
- Buttons:** 'Submit' and 'Cancel' buttons at the bottom right.

Annotations on the left side of the form:

- 'Attach a file' points to the 'Click here to attach a file or drag-and-drop' link.
- 'Drag and drop a file anywhere' points to the same link.
- 'Your contact information' points to the 'Email Address' and 'Phone Number' fields.
- 'Notify additional people' points to the 'Notify additional people' link.

Report an Issue Additional Anatomy

Step 8: When ready to submit an issue ticket, click “Submit”. To view submitted issues, navigate to the “My Submitted Issues”^{*} subfolder.

^{*} See Chapter 3: Home Workspace: Menu Options, Folders and subfolders/My Submitted Issues: Subfolder/