: Basics of Entering Data into ClientTrack

Client data is collected at three main points in the client's participation in a program: intake, case management, exit. ClientTrack* has functions to prevent incorrect or incomplete data from being entered. Familiarizing with how these functions work (and how they do not work) will help in keeping these errors to a minimum.

HUD* mandates inputting data into HMIS within 24 hours from the interaction with the client(s). Data input timeframes are monitored by ClientTrack and HUD.

Data Entry

Data Entry Points

* *For online resources related to ClientTrack, see Introduction/*Online Resources *in the* "HMIS Basic User 2025 Manual".

ClientTrack Workflows

ClientTrack utilizes built "Workflows"* for a given data collection process. Using "Workflows" ensures that important steps in a process are taken, and that resulting reports can populate correct data.

**For basic anatomy and methodology on "Intake Workflows", see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/*HMIS Intake: Folder

Navigating through a Workflow

Tips and Tricks - *HMIS Intake Workflows and Find Client - Preventing Multiple (Duplicate) Client Entries*

- Use "Find Client" to search for clients into HMIS before starting an "Intake" workflow.

- To utilize the full potential of "Find Client"*, start with less information and build up to attempt to find a client and/or any potential duplicate clients.

**For instructions on best practices for using the "Find Client" folder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/* Best Practices to Search for Clients in HMIS.

- An example is to use the first two letters of the client's first, last name, and/or a partial social security number.

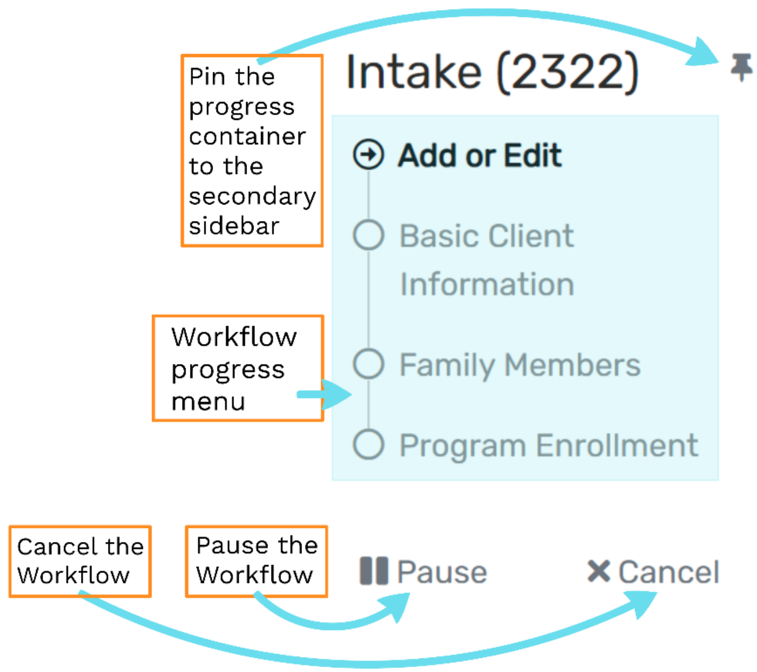
- A dynamic search has the added benefit of potentially finding clients that have had information, such as a mispelled name or incorrect social security # instead of creating an accidental additional profile.

Preventing Multiple Client Entries

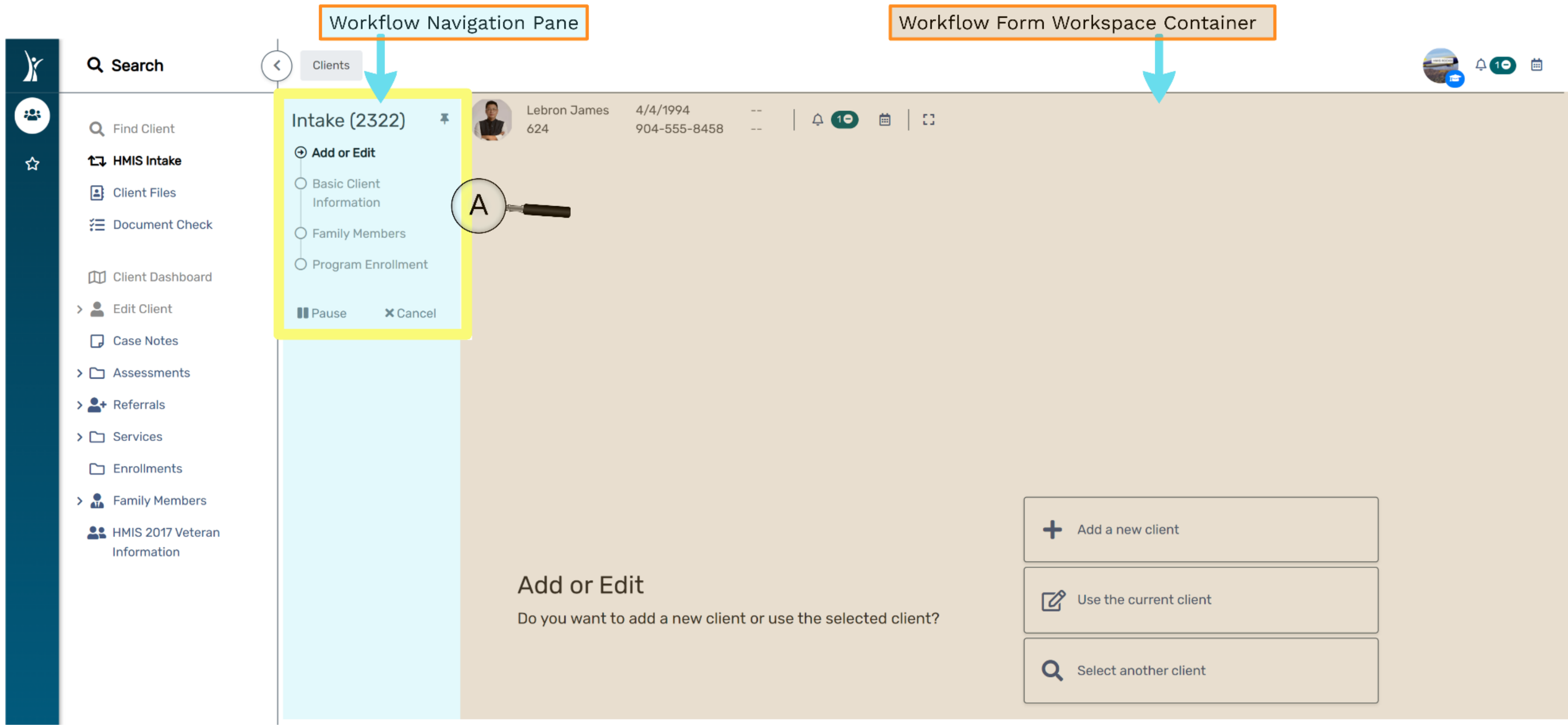
A "Workflow**"*** is a series of forms that constitute a data gathering process. Each time a Workflow in ClientTrack is initiated, a "Workflow Navigation Pane" will open to the right of the secondary sidebar**.

**For basic anatomy and methodology on "Intake Workflows", see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/* HMIS Intake: Folder

***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".

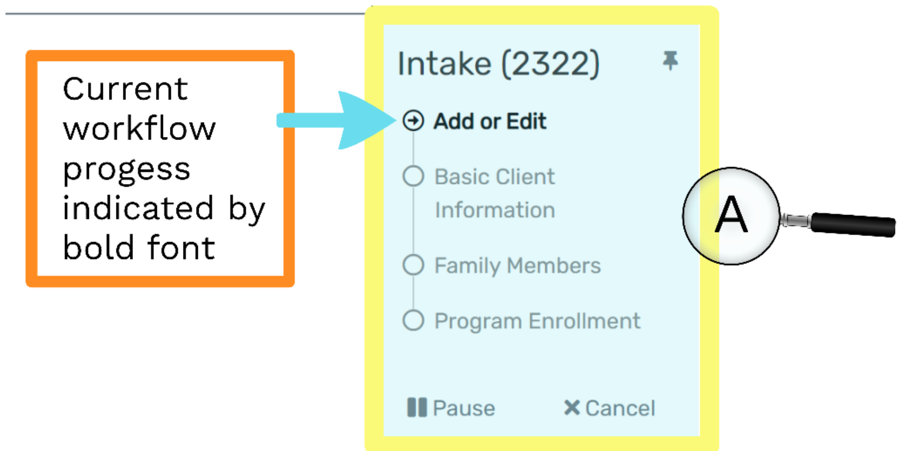


Workflow Navigation Pane Anatomy

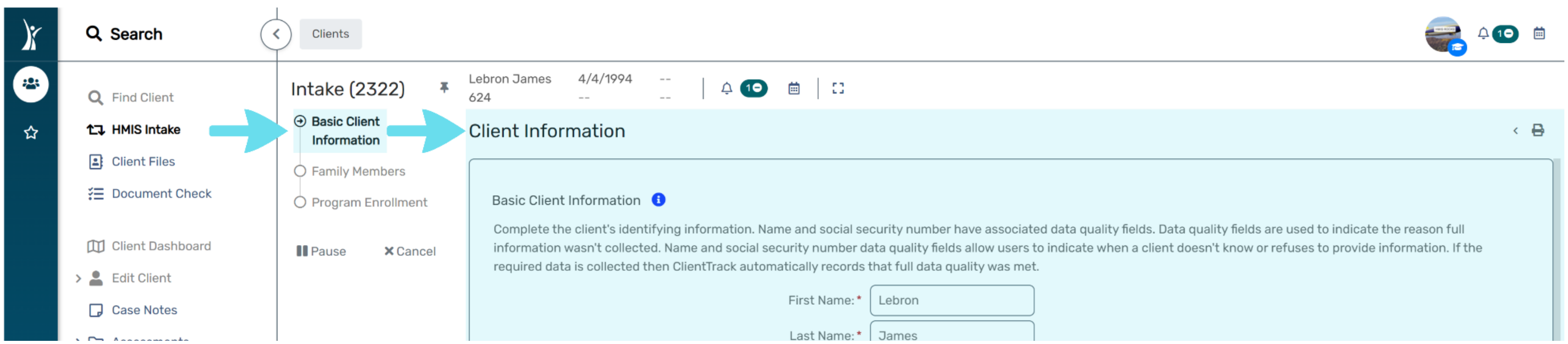


Workflow Anatomy

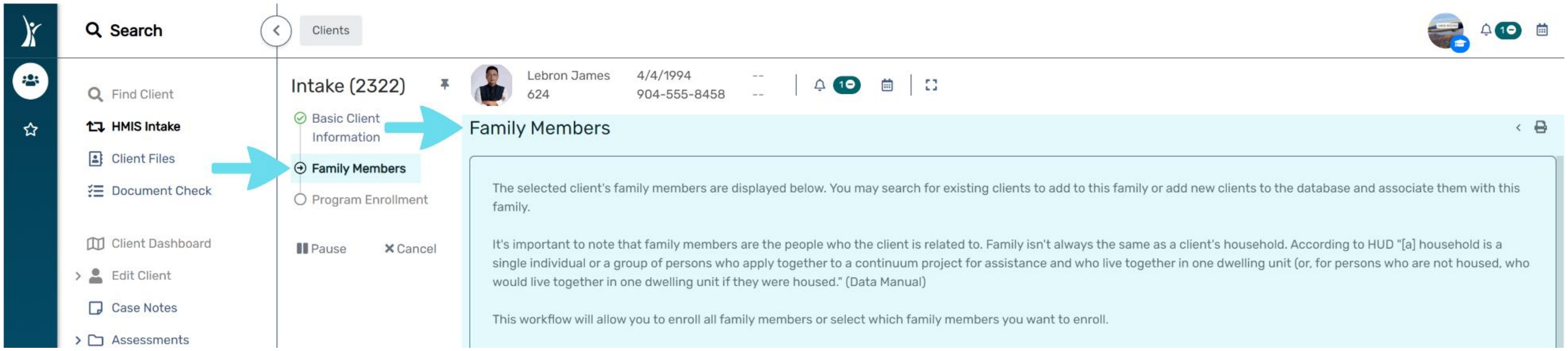
ClientTrack is designed to accommodate data collection needs for unique programs. A workflow adjusts dynamically based on a variety of criteria. As a workflow progresses, workflow form workspace containers change and dynamic progress is distinguishable via bold font in the workflow navigation pane.



Workflow Navigation Pane Progress



Workflow Navigation Pane Progress



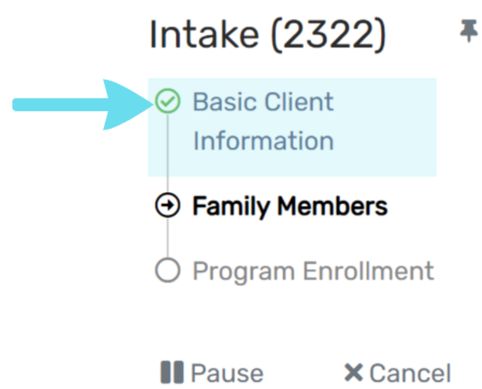
Workflow Navigation Pane Progress

Tips and Tricks - *Navigating to previous workflow forms in workflows*

- Completed workflow steps will be indicated with a green check mark icon.

- To navigate backwards to completed workflow forms, click anywhere in the area of workflow form text with a green check mark.

⚠ Although it's possible to navigate backwards to review work or make corrections, navigating backwards after the Program Enrollment workflow step can cause errors.



Tips and Tricks – Navigating to Previous Workflow Forms in Workflows

Universal Data Elements

Program Specific Data Elements

STEPS	DATA COLLECTED	PAUSING HERE WILL	CLOSING HERE WILL
Basic Client Information	First Name Last Name Name Quality Social Security Number SSN Quality Birth Date Date of Birth Quality Ethnicity Race Gender Disabling Condition Veteran Status (18+) Relationship to Head of Household	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	For existing clients: Erase the Workflow. The workflow will not be retrievable. For clients new to HMIS: A new client record will be created, but no enrollments will be started for that client
Family Members	**For Each Family Member Added:** First Name Last Name Name Quality Birth Date Date of Birth Quality Ethnicity Social Security Number SSN Quality Race Relationship to Head of Household Gender Disabling Condition Veteran Status (18+)	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	For family members in HMIS: Erase the Workflow. The workflow will not be retrievable. For family members NEW to HMIS: A new record will be created for each new family member, but no enrollments will be started for those clients
Program Enrollment	**Select Program to Enroll Client In:** The list of available programs will depend on a few things: 1) Which programs your agency provides 2) If it is a new program, the HMIS Systems Team needs to know how you would like it set up in ClientTrack 3) If you are enrolling the client within the program start/end dates	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	Before clicking "Save": Erase the Workflow. The workflow will not be retrievable. After Clicking "Save": Save the Workflow under a Client's Enrollments

"POINT OF NO RETURN":

Once the "Save" button on the Program Enrollment form is clicked, do not change any data on the Basic Client Information, Family Members or Program Enrollment forms. The Workflow will not update. Instead, contact hmis@changinghomelessness.org or send an issue ticket.

STEPS	DATA COLLECTED	PAUSING HERE WILL	CLOSING HERE WILL
Head of Household Assessments	**Assessments:** Universal Data Assessment Program Specific Data Element Assessemnts vary by the specfic data elements a program is trying to capture. Examples include, but are not limited to, Veteran Details, Income, Current Living SItuation, Barriers/Special Needs.	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	Before clicking "Save": Close the workflow. All data on form will be lost. After Clicking "Save": Save the Workflow under a Client's Enrollments with all data saved. Partial workflow may lead to data quality issues

HMIS Intake Workflow Navigation

Initiating a Workflow (Entry/Exit)

Initiating Entry Workflows (Enrolling Clients in Programs)

Entry workflows are initiated through a “Client Intake.” Client Intakes are initiated through the “Client Intake” folder* in the Client Workspace.**

**For information and instructions on the Client Intake folder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders*

*** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* “HMIS Basic User 2025 Manual”.

Initiating Exit Workflows (Exiting Clients from Programs)

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”.***

** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/*Quick Search *in the* “HMIS Basic User 2025 Manual”.

** *For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using “Find Client” *in the* “HMIS Basic User 2025 Manual”.

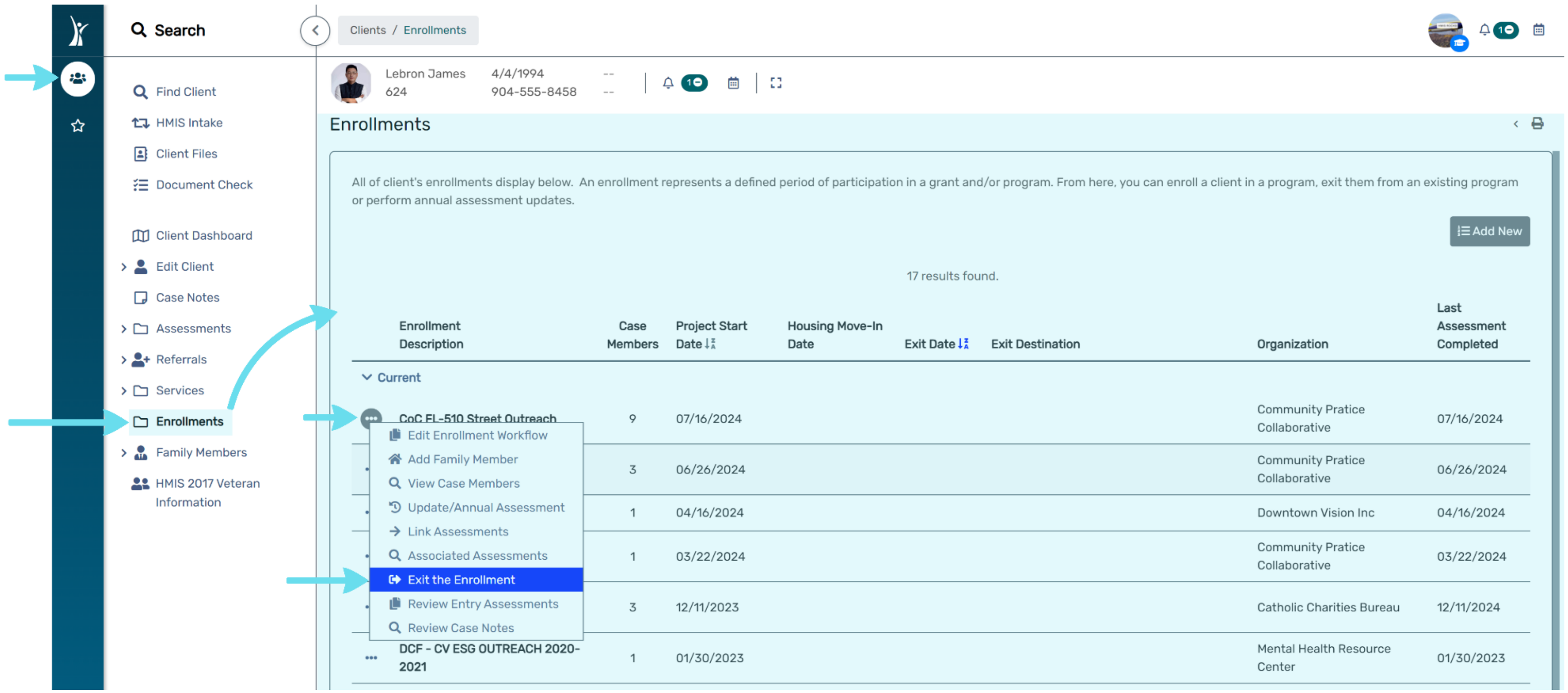
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* “HMIS Basic User 2025 Manual”.

Step 2: Select the “Enrollments” secondary sidebar* menu option. ClientTrack will navigate to the “Enrollments” workspace container.

**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”.

Step 3: Select the action button* next to the appropriate existing enrollment. Select "Exit the Enrollment." ClientTrack will navigate to the Enrollment Exit workflow step in the HUD Program Exit workspace container.

** 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".



Initiating Client Enrollment Exit

Step 4: Navigate through the workflow*

*** For information and instructions on navigating through ClientTrack Workflows, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows/*Navigating through a Workflow in *the* “HMIS Basic User 2025 Manual”.