

Editing an Existing Enrollment

Workflow data may need to be updated or changed after a completed program enrollment* workflow. This section will cover the basics of editing specific types of information after an enrollment workflow has already been completed** for a currently open enrollment.

* *Client Enrollments: To learn how to navigate to the “Enrollments” folder, see Chapter 3: Home Workspace Menu Options, Folders, and Subfolders/Enrollments: Folder in the “HMIS Basic User 2025 Manual”.*

** *For information on ClientTrack Workflows, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows in the “HMIS Basic User 2025 Manual”.*

Tips and Tricks - Editing Workflows



- Workflows do not automatically update in certain cases which can cause data errors.
- For Enrollments: Once the "Program Enrollments" form workflow step is completed, editing any data from a prior step in the workflow while still in the workflow will cause errors. Complete the workflow without editing incorrect data and email hmis@changinghomelessness.org to have the data corrected.

Tips and Tricks – Editing Workflows

Editing an Existing Enrollment: Adding a Housing Move in Date

Steps to Adding a Housing Move in Date

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”.*



Search

Clients / Enrollments



- Find Client
- HMIS Intake
- Client Files
- Document Check
- Client Dashboard
- Edit Client
- Case Notes
- Assessments
- Referrals
- Services
- Enrollments**
- Family Members
- HMIS 2017 Veteran Information

Lebron James 4/4/1994 -- | 2 |
624 904-555-8458 -- |

Enrollments

All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment updates.

Add New

25 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
CoC FL-510 Street Outreach	1	07/15/2024				Community Pratic Collaborative	07/15/2024
ESG - Emergency Rental Assistance Program	3	06/26/2024				Community Pratic Collaborative	06/26/2024
DVI - Block by Block	1	04/16/2024				Downtown Vision Inc	04/16/2024
FL - 510 Homeless Prevention	1	04/11/2024				Catholic Charities Bureau	04/11/2024
CoC FL-510 Coordinated Entry	1	03/22/2024				Community Pratic Collaborative	03/22/2024
FL-510 Duval/Clay/Nassau Rapid Re-Housing	1	03/11/2024				Catholic Charities Bureau	03/11/2024
DCF - CV ESG OUTREACH 2020-2021	1	01/30/2023				Mental Health Resource Center	01/30/2023
New Dawn Outreach	1	01/26/2023				Changing Homelessness	
EFSP- ARPA-R	1	09/14/2022				Family Support Services of North Florida	09/14/2022
ABH - CASA	1	08/05/2022				Changing Homelessness	
DCF - CV ESG HP 2020-2021	3	11/10/2021				Jewish Family & Community Services	11/10/2021

Cancel

Navigating to Enrollments Folder

Step 3: Select the action button next to the appropriate enrollment. Select “Edit Household Members’ Enrollment Information.”

*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”.

The screenshot displays the 'Enrollments' page for a client named Lebron James. The page includes a sidebar with navigation options like 'Find Client', 'HMIS Intake', and 'Edit Client'. The main content area shows a table of enrollments with columns for Description, Case Members, Project Start Date, Housing Move-In Date, Exit Date, Exit Destination, Organization, and Last Assessment Completed. A dropdown menu is open for the first enrollment, listing various actions such as 'Edit Household Members' Enrollment Information', 'Edit Enrollment Workflow', and 'Add Family Member'. A red arrow points to the 'Edit Household Members' Enrollment Information' option.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
FL- 504 Volusia/Flagler Rapid Rehousing	2	11/20/2024				Community Praticce Collaborative	11/20/2024
				5/2024		Community Praticce Collaborative	07/15/2024
				6/2024		Community Praticce Collaborative	06/26/2024
				6/2024		Downtown Vision Inc	04/16/2024
				2/2024		Community Praticce Collaborative	03/22/2024
				2/2024		Catholic Charities Bureau	
DCF - CV ESG OUTREACH 2020-2021	1	01/30/2023				Mental Health Resource Center	01/30/2023

Edit Household Members' Enrollment Information

Step 4: Enter the Client’s housing move-in date into the Housing Move-in date box. Click “Save” to save changes. Click “Cancel” to exit without saving. ClientTrack will navigate to the “Enrollments” workspace container.

Search

Clients / Lebron James's Dashboard / HUD Program Enrollment

Lebron James 4/4/1994
624 904-555-8458

HUD Program Enrollment

Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

The Project Start Date is:

- For **Street Outreach** projects – it is the date of first contact with the client.
- For **Emergency Shelters** – it is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without “exiting and restarting” for each stay for a specified period.
- For **Safe Havens** and **Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
- For all types of **Permanent Housing**, including **Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
 - Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered)
 - The client has indicated they want to be housed in this project
 - The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time
- For all other types of Service projects including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: * FL- 504 Volusia/Flagler Rapid Rehousing ⓘ

Household

Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Exit Date	Case Manager ⓘ	Relationship to Head of Household*	Housing Move-in Date
<input checked="" type="checkbox"/>	James, Lebron Bradley	Multiple-Genders	30	11/20/2024 📅	MM/DD/YYYY	training trainer 🔍	Self ▾	MM/DD/YYYY 📅

Save Save Cancel

Entering and Recording Client Housing Move-In Date