Current Enrollments w/ Most Recent Assessment: Subfolder

The “Current Enrollments w/ Most Recent Assessment” allows users to populate a list of clients and sort clients in a caseload by their last assessment date.

The Current Enrollments w/ Most Recent Assessment doesn’t run on for a specific user. The search will display all open enrollments filtered by program for all users.

Steps to Navigate to the “Current Enrollments w/ Most Recent Assessment” Folder Menu and Populate a list of Clients

Step 1: Navigate to the Home Workspace*.

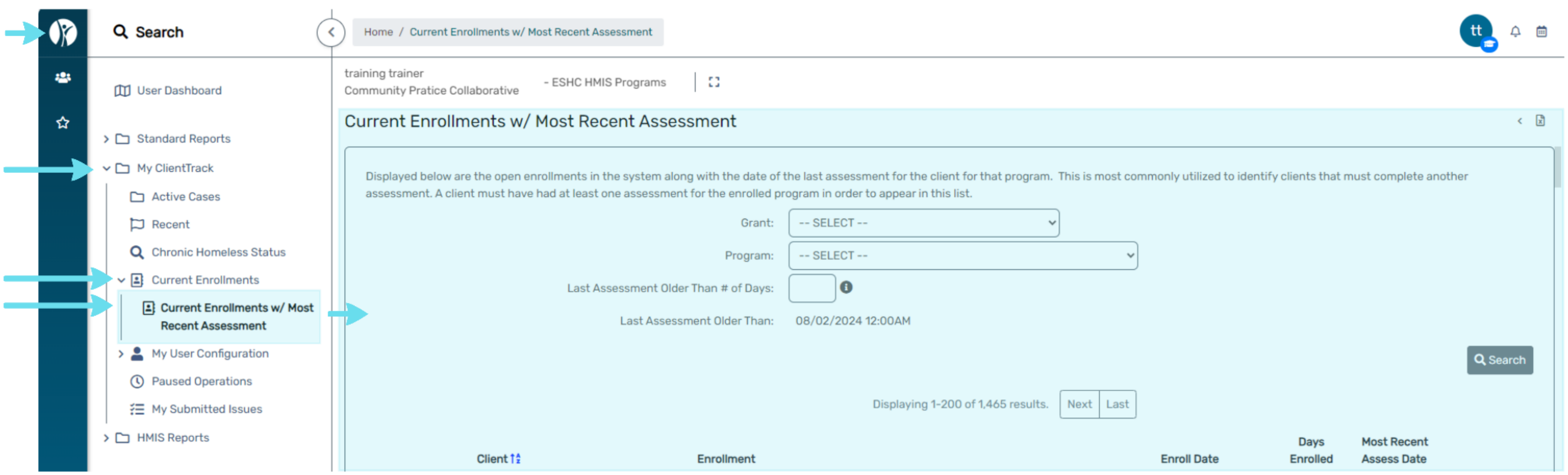
**To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces in *the* “HMIS Basic User 2025 Manual”.

Step 2: Select the "My ClientTrack" secondary sidebar* menu option. A dropdown menu will appear under the "My ClientTrack" 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".

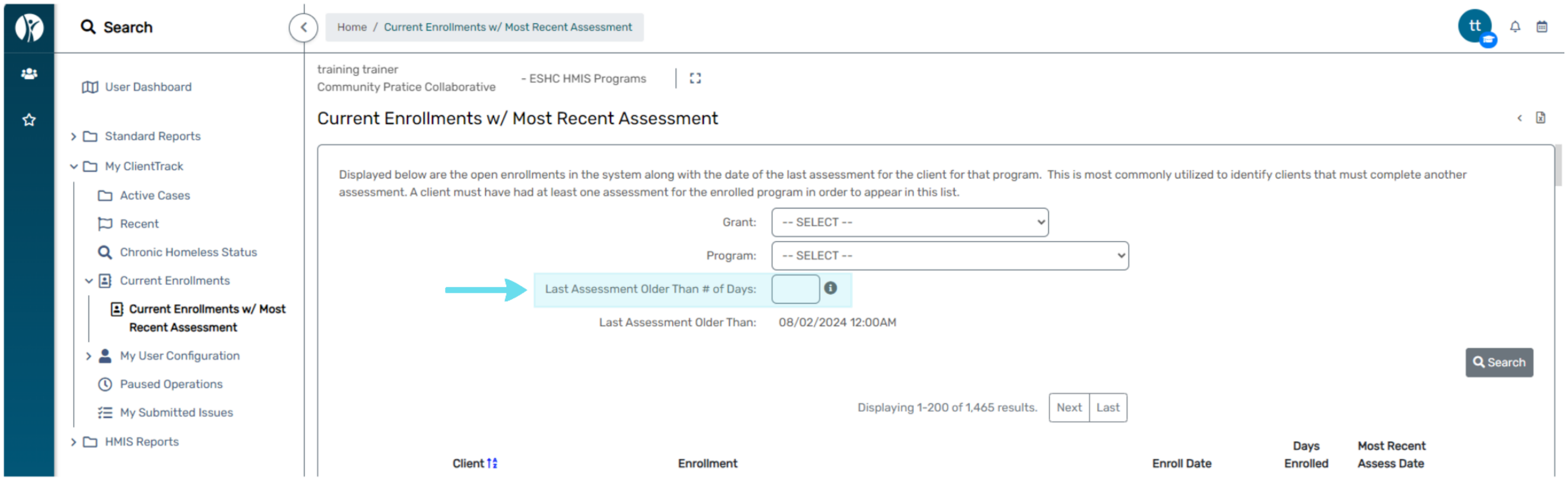
Step 3: Select the "Current Enrollments" secondary sidebar menu option. A dropdown menu will appear under the "Current Enrollments" subfolder.

Step 4: Select the "Current Enrollments w/ Most Recent Assessment" secondary sidebar menu option. ClientTrack will navigate to the "Current Enrollments w/ Most Recent Assessment" workspace container.

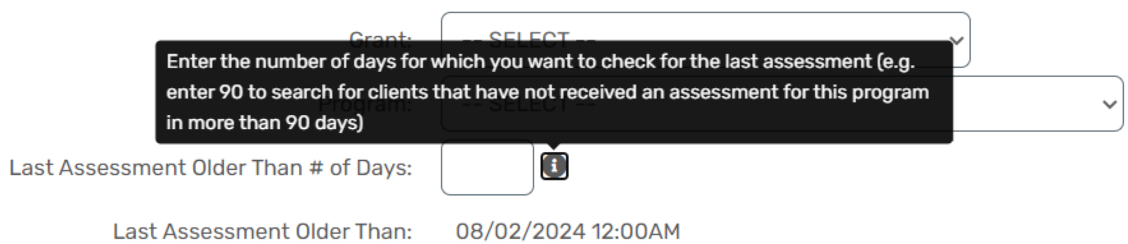


Current Enrollments with Most Recent Assessment

Step 4: Select "Grant" type from the dropdown menu if applicable. Select "Program" type from the dropdown menu if applicable. Enter search criteria for "Last Assessment Older Than #of Days:"



Current Enrollments with Most Recent Assessment – Days Search Critieria



Current Enrollments with Most Recent Assessment – Days Search Critieria Information

Step 5: Click “Search” button. Open enrollments in the program selected will populate, including some statistics such as VISPDAT Score Total, Enroll Date, Number of Days Enrolled, and Case Members (number of family members enrolled in that program).