

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.

The screenshot displays the ClientTrack web application interface. On the left, a dark blue sidebar contains a search bar and a list of menu items. Red arrows highlight the navigation path: from the top icon, down to 'My ClientTrack', then to 'Current Enrollments', and finally to 'Current Enrollments w/ Most Recent Assessment'. The main content area shows the title 'Current Enrollments w/ Most Recent Assessment' and a description: 'Displayed below are the open enrollments in the system along with the date of the last assessment for the client for that program. This is most commonly utilized to identify clients that must complete another assessment. A client must have had at least one assessment for the enrolled program in order to appear in this list.' Below this text are filters for 'Grant' and 'Program' (both set to '-- SELECT --'), a 'Last Assessment Older Than # of Days' input field, and a 'Last Assessment Older Than' date field showing '08/02/2024 12:00AM'. A 'Search' button is located on the right. At the bottom, it says 'Displaying 1-200 of 1,465 results.' with 'Next' and 'Last' buttons. A table header is partially visible at the bottom with columns: 'Client', 'Enrollment', 'Enroll Date', 'Days Enrolled', and 'Most Recent Assess Date'.

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:”

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Current Enrollments w/ Most Recent Assessment

Displayed below are the open enrollments in the system along with the date of the last assessment for the client for that program. This is most commonly utilized to identify clients that must complete another assessment. A client must have had at least one assessment for the enrolled program in order to appear in this list.

Grant: -- SELECT --
Program: -- SELECT --

Last Assessment Older Than # of Days: ⓘ

Last Assessment Older Than: 08/02/2024 12:00AM

Displaying 1-200 of 1,465 results. [Next](#) [Last](#)

Client ⓘ	Enrollment	Enroll Date	Days Enrolled	Most Recent Assess Date
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Current Enrollments with Most Recent Assessment – Days Search Criteria

Grant: -- SELECT --
Program: -- SELECT --

Last Assessment Older Than # of Days: ⓘ

Last Assessment Older Than: 08/02/2024 12:00AM

Current Enrollments with Most Recent Assessment – Days Search Criteria 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).