

Editing an Existing Enrollment: Managing Family Members

Editing an Existing Enrollment: Adding A Family Member

Steps to Adding a Family Member to an Existing Enrollment

There are many ways to add a family member to enrollments that can cause data errors. The steps in this section will ensure that all the data associated with this program enrollment is captured and updated correctly.

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 enrollment. Select “Add Family Member.” ClientTrack will re-open the enrollment Family Members workflow** step.

** 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 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”.*

If adding a new family member to an existing enrollment, click the checkbox next to the last row, and add or update the applicable information for the added family member(s).

Existing Family Members

Add Family Member

	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date*	Age	Birth Date Quality*	Gender*	Please Specify
<input checked="" type="checkbox"/>	maria		smith		Full name reported	03/05/1955	69	Full DOB Reported	Woman (Girl, if chil...	
<input checked="" type="checkbox"/>	Jane		Austin		Full name reported	04/01/1985	39	Approximate or Partial DOB Reported	Woman (Girl, if chil...	
<input checked="" type="checkbox"/>	Lebron	Bradley	James		Full name reported	04/04/1994	30	Full DOB Reported	Questioning, Man (Bo...	
<input checked="" type="checkbox"/>	James		Cleveland		Full name reported	01/01/2000	24	Full DOB Reported	Transgender	
<input checked="" type="checkbox"/>	James		Bronny		Full name reported	10/06/2004	19	Full DOB Reported	Man (Boy, if child)	
<input checked="" type="checkbox"/>	Jimmy		James		Full name reported	05/05/2019	5	Full DOB Reported	Man (Boy, if child)	
<input checked="" type="checkbox"/>	Janise	LaVette	James		Full name reported	03/11/2020	4	Full DOB Reported	Woman (Girl, if chil...	
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-- SELECT --	MM/DD/YYYY	N/A	-- SELECT --	...	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-- SELECT --	MM/DD/YYYY	N/A	-- SELECT --	...	

Save Save & Close

Adding Family Members to Existing Enrollments Workflow Step

Step 5: ClientTrack will prompt you to search the system for possible duplicates*. A search form will pop up. View the names that appear in the results. If there is a match, click on that row.

If a record(s) is found, verify if the potential client record is or isn't the client currently being enrolled. If the record is of the client being enrolled, enroll the client from the existing record.

If no records are found, click cancel. This will return you to the Family Members page. Complete the remaining applicable fields for the new family member.

**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*

Search

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

First Name: Janise

Last Name: James

Middle Name: Lavette

Full Name (Last, First):

Social Security Number:

Birth Date: MM/DD/YYYY

Scan Client ID:

Click Search (Blue box will turn gray once search is executed)

Search

1 result found.

First Name	Last Name	Middle Name	SSN	Birth Date
Janise	James	LaVette	???-??-2324	03/11/2020

Cancel

Potential duplicate client found.

Adding Family Member – Search for Potential Duplicate Entry

Search

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Social Security Number:

Birth Date:

Scan Client ID:

No records found.

First Name	Last Name	Middle Name	SSN	Birth Date
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No duplicate client found.

Adding Family Member – No Duplicate Found

The Existing Enrollment Workflow will be updated; 1. The “Workflow Navigation Pane” and 2. The HUD Program Enrollment workspace container.

1. The Workflow Navigation Pane "Add Family Member" workflow step which connects to the Intake/Enrollment Workflow)
2. The new family member will be listed on the "HUD Program Enrollment" page

HUD Program Enrollment

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Exit Date	Case Manager
<input checked="" type="checkbox"/>	James, Lebron Bradley	Multiple-Genders	30	07/15/2024	MM/DD/YYYY	Benjamin Robertson
<input type="checkbox"/>	Cleveland, James	Transgender	24	MM/DD/YYYY	MM/DD/YYYY	
<input type="checkbox"/>	Bronny, James	Man (Boy, if child)	19	MM/DD/YYYY	MM/DD/YYYY	
<input type="checkbox"/>	James, Jimmy	Man (Boy, if child)	5	MM/DD/YYYY	MM/DD/YYYY	
<input type="checkbox"/>	James, Janise LaVette	Woman (Girl, if child)	4	MM/DD/YYYY	MM/DD/YYYY	
<input type="checkbox"/>	James, Jacob LaVette	Man (Boy, if child)	4	MM/DD/YYYY	MM/DD/YYYY	

Workflow Navigation Pane:

- Search
- Add Family Member
 - Review Family Members
 - Enrollment
 - Pause
 - Cancel
- Find Client
- HMIS Intake
- Client Files
- Document Check
- Client Dashboard
- Edit Client
- Case Notes
- Assessments
- Referrals
- Services
- Enrollments
- Family Members
- HMIS 2017 Veteran Information

Buttons: Save, No Changes

Adding Family Members to Existing Enrollments – Two Areas of Update

Step 6: Because the family member is being added through the head of household's enrollment, that enrollment is auto selected and not able to be edited. Via the checkbox, select next to the applicable client to enroll the client in the program. Click "Save".

Step 7: Complete any additional workflow steps if applicable. Click the finish button to close the enrollment. ClientTrack will navigate to the “Enrollments” workspace container. The number in the column for the applicable updated enrollment will reflect the number of total family members.

Tips and Tricks - Enrolling New Family Members



- There will be special cases when the enrollment date of the new family member may NOT be the same as the rest of the family. To verify which date to use, speak with your supervisor

Tips and Tricks – Enrolling New Family Members 1

Tips and Tricks - Enrolling New Family Members



- For the Universal Data Assessment it is imperative that you answer the same data for the new family member for the following fields: Housing Status and any questions asked under “Living Situation”

Tips and Tricks – Enrolling New Family Members 2

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Search

Clients

Add Family Member

Review Family Members

Enrollment

Pause Cancel

Find Client

HMIS Intake

Client Files

Document Check

Client Dashboard

Edit Client

Case Notes

Lebron James
624

4/4/1994
904-555-8458

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2

You're done!


All required steps have been completed.

Finish



Close the workflow

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.



17 results found.

Enrollment Description	Case Members	Project Start Date 	Housing Move-In Date	Exit Date 	Exit Destination	Organization	Last Assessment Completed
▼ Current							
... FL- 504 Volusia/Flagler Rapid Rehousing	4	11/20/2024	12/06/2024			Community Praticce Collaborative	11/20/2024
... CoC FL-510 Street Outreach	9	07/15/2024				Community Praticce Collaborative	07/15/2024

Editing an Existing Enrollment – Adding Additional Family Members – Updated Case Members

Editing an Existing Enrollment: Removing a Family Member

If, during* an enrollment, a household's family member(s) status changes and the family member is no longer participating/eligible in a program, the family member(s) is to be exited from the program enrollment.

**If a family member(s) was enrolled incorrectly, please reach out to a supervisor and contact the HMIS team by email at hmis@changinghomelessness.org or by sending an Issue Ticket* for assistance to get assistance on editing/correcting the enrollment.*

**For instructions on how to submit an issue through ClientTrack, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Help Center/How to Submit an Issue Ticket*

Steps to Initiating an Exit Workflow for Non-Head-of-household Family Member(s) – 2 Methods

Method 1 (of 2): Exiting a family member through the Head of Household's Profile

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”.*

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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 enrollment. Select “View Case Members”. ClientTrack will navigate to the “Enrollment Case Members” 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”.*

The screenshot shows the ClientTrack interface. On the left sidebar, the 'Enrollments' option is highlighted with a blue arrow. The main content area displays the 'Enrollments' section for a client named 'Lebron James 624'. A table lists 17 results found. The first row, 'CoC FL-510 Street Outreach', is selected, and a context menu is open showing various actions. The 'View Case Members' action is highlighted with a blue arrow.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
CoC FL-510 Street Outreach	4	07/16/2024				Community Praticce Collaborative	07/16/2024
		06/26/2024				Community Praticce Collaborative	06/26/2024
		04/16/2024				Downtown Vision Inc	04/16/2024
		03/22/2024				Community Praticce Collaborative	03/22/2024
		12/11/2023				Catholic Charities Bureau	12/11/2024
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	

Navigating to Case Members Workspace through Enrollments

Step 4: Select the action button next to the appropriate client. Select “Exit the Enrollment.” ClientTrack will navigate to the Enrollment Exit workflow step in the HUD Program Exit workspace container.

Search

Clients / FL- 504 Volusia/Flagler Rapid Rehousing / Enrollment Case Members

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

Enrollment Case Members

The Case Members display below. To view or add the household application select the edit button on the left hand side of the member you would like to edit.

+ Add New

4 results found.

Case Member	Grant	Relationship	Enroll Date	Exit Date
*** Lavette, Larry		Other Family Member	11/22/2024	
*** Lavette, James Jacob		Other Family Member	11/22/2024	
*** [Action: Edit Enrollment, Exit Enrollment]		Other Family Member	11/22/2024	
*** James, Lebron Bradley		Self	11/22/2024	

Initiating Family Member Exit Enrollment

Step 5: 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”.

Method 2 (of 2): Exiting a family member through the Family Member’s Profile

Step 1: Select the appropriate family member’s 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”.*

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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”.*

Search Clients / Enrollments

Lebron James 624 4/4/1994 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.

17 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
▼ Current							
CoC FL-510 Street Outreach	9	07/16/2024				Community Praticce Collaborative	07/16/2024
DCF - CV ESG OUTREACH 2020-2021	1	01/30/2023				Mental Health Resource Center	01/30/2023

Context Menu for CoC FL-510 Street Outreach:

- Edit Enrollment Workflow
- Add Family Member
- View Case Members
- Update/Annual Assessment
- Link Assessments
- Associated Assessments
- Exit the Enrollment**
- Review Entry Assessments
- Review Case Notes

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".