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".

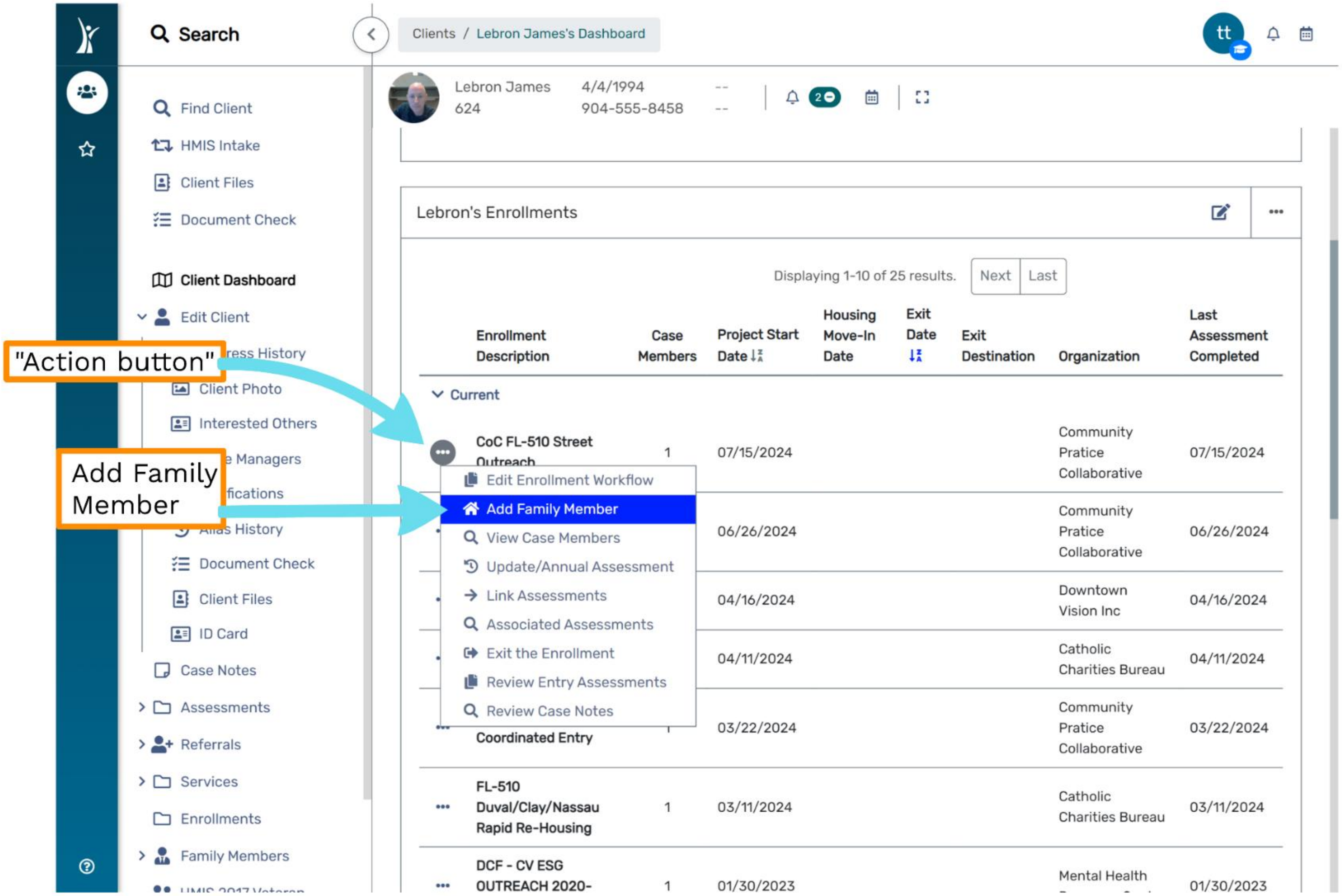
Step 2: Select the "Enrollments" secondary sidebar* menu option. ClientTrack will navigate to the "Enrollments" workspace container.

**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".

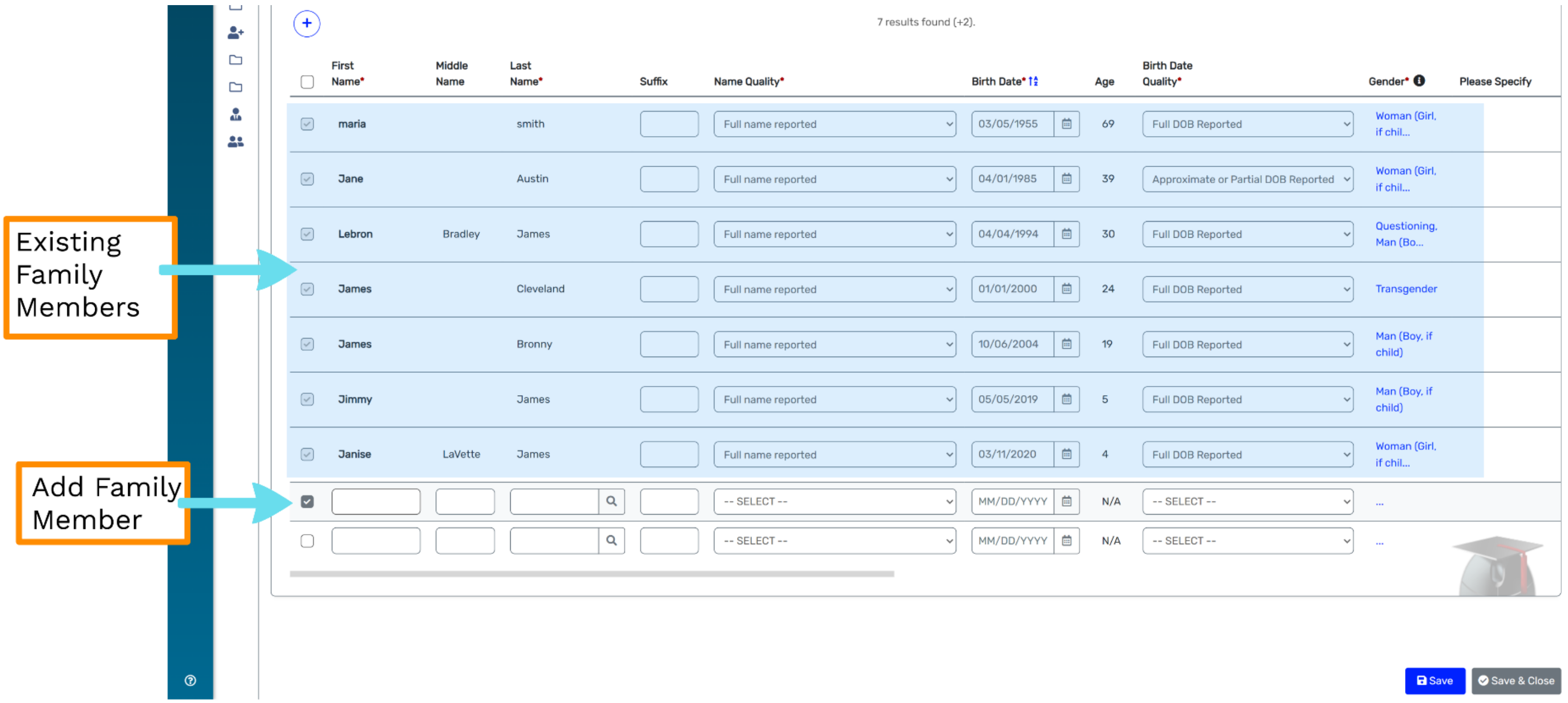
*** For information and instructions on navigating through ClientTrack Workflows, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows/*Navigating through a Workflow in *the* "HMIS Basic User 2025 Manual".



Editing Enrollments – Adding Family Member Navigation

Step 4: If adding an existing family member(s) to an existing enrollment, update any information if applicable and click the "Save and Close" button. Skip step 5 and continue to step 6.

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).



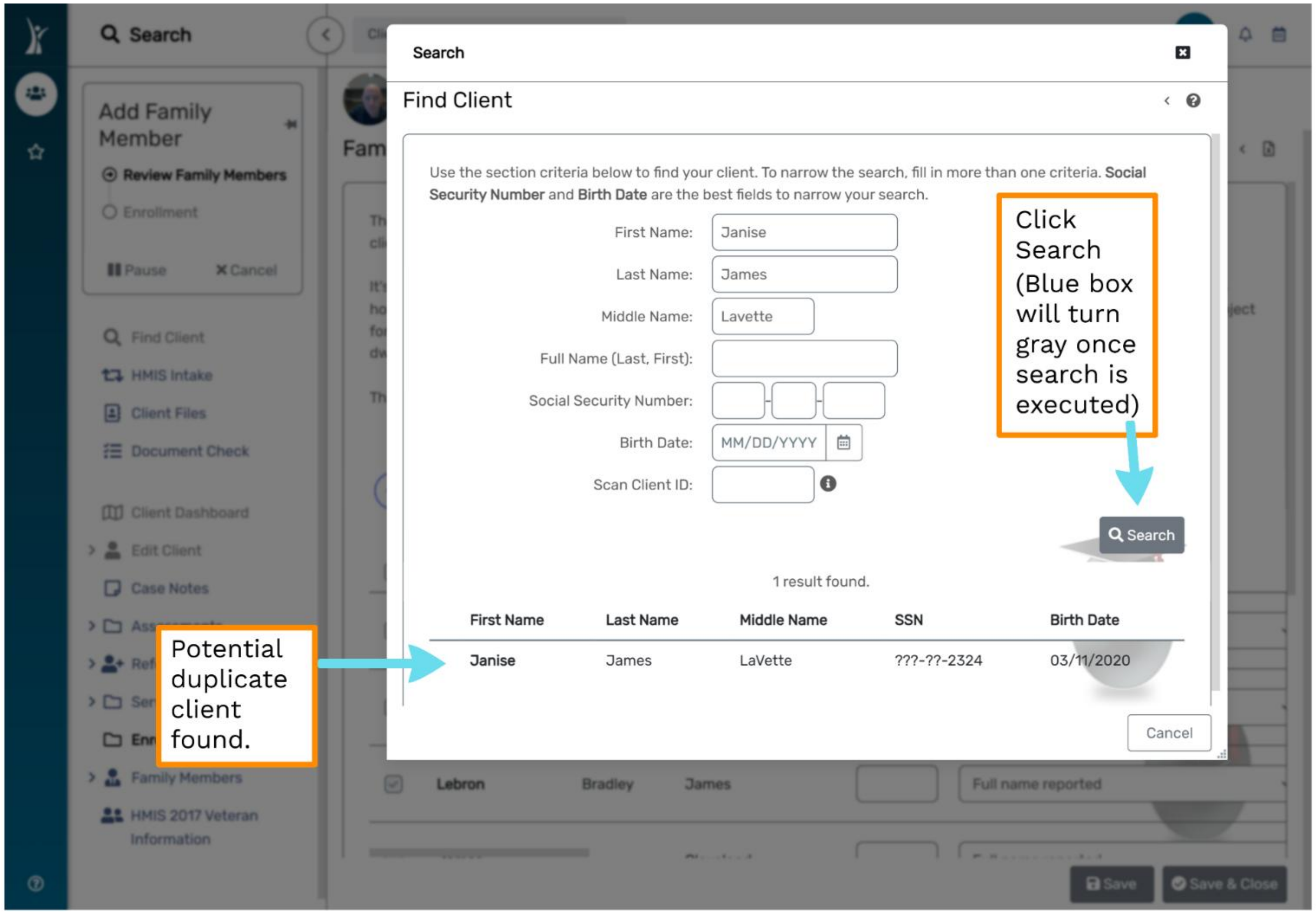
Adding Family Members to Existing Enrollments Workflow Step

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.

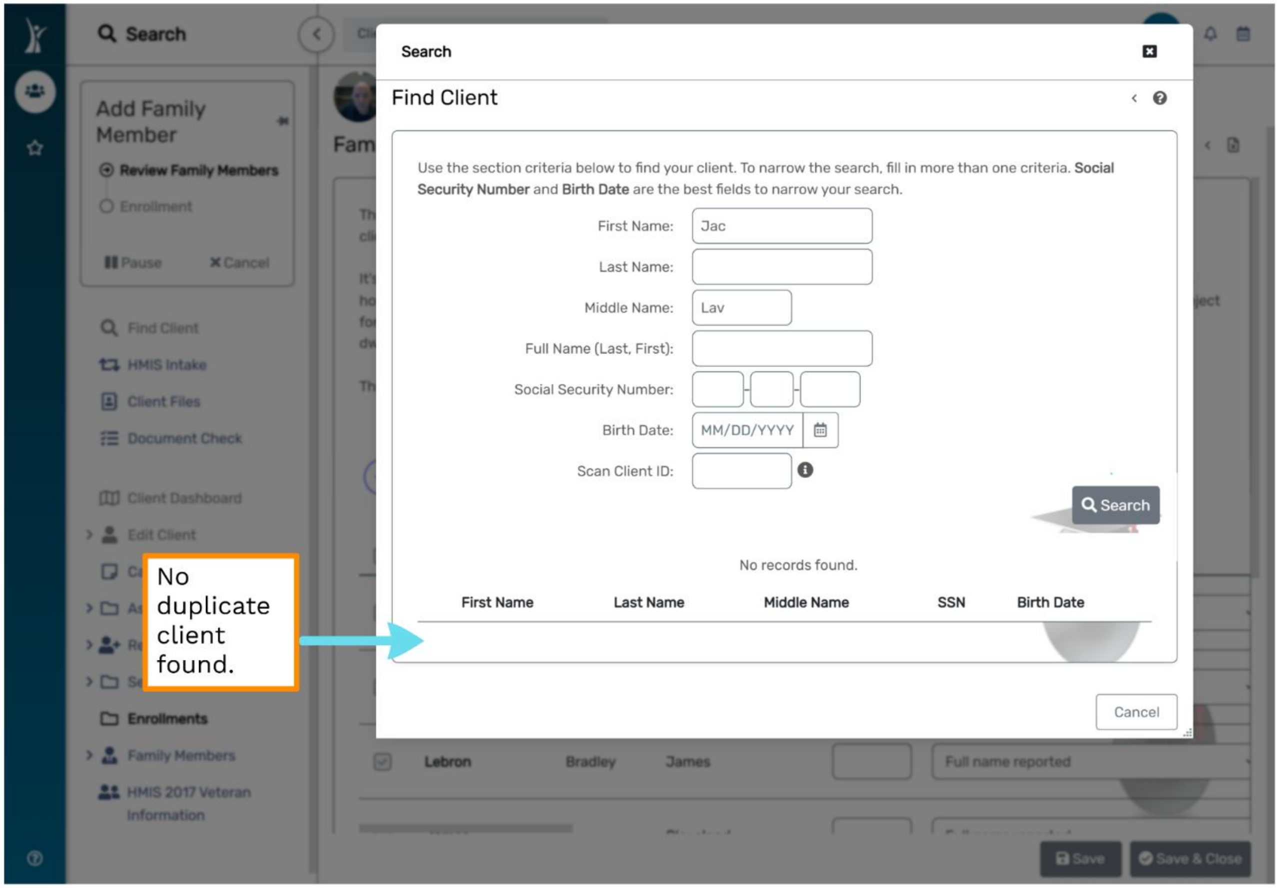
If a record(s) is found, verify if the potential client record is or isn't the client currently being enrolled. If the record is of the client being enrolled, enroll the client from the existing record.

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



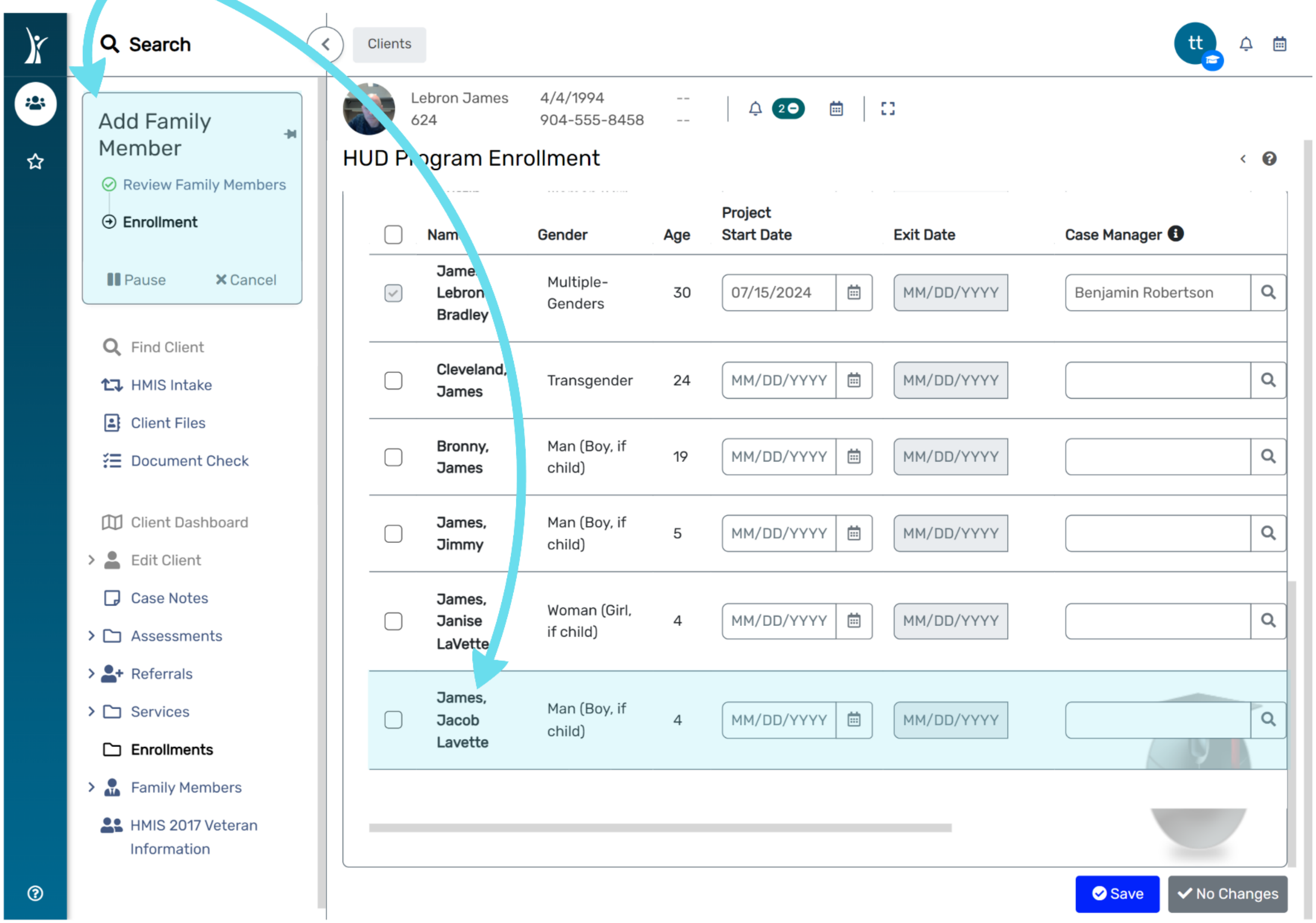
Adding Family Member – Search for Potential Duplicate Entry



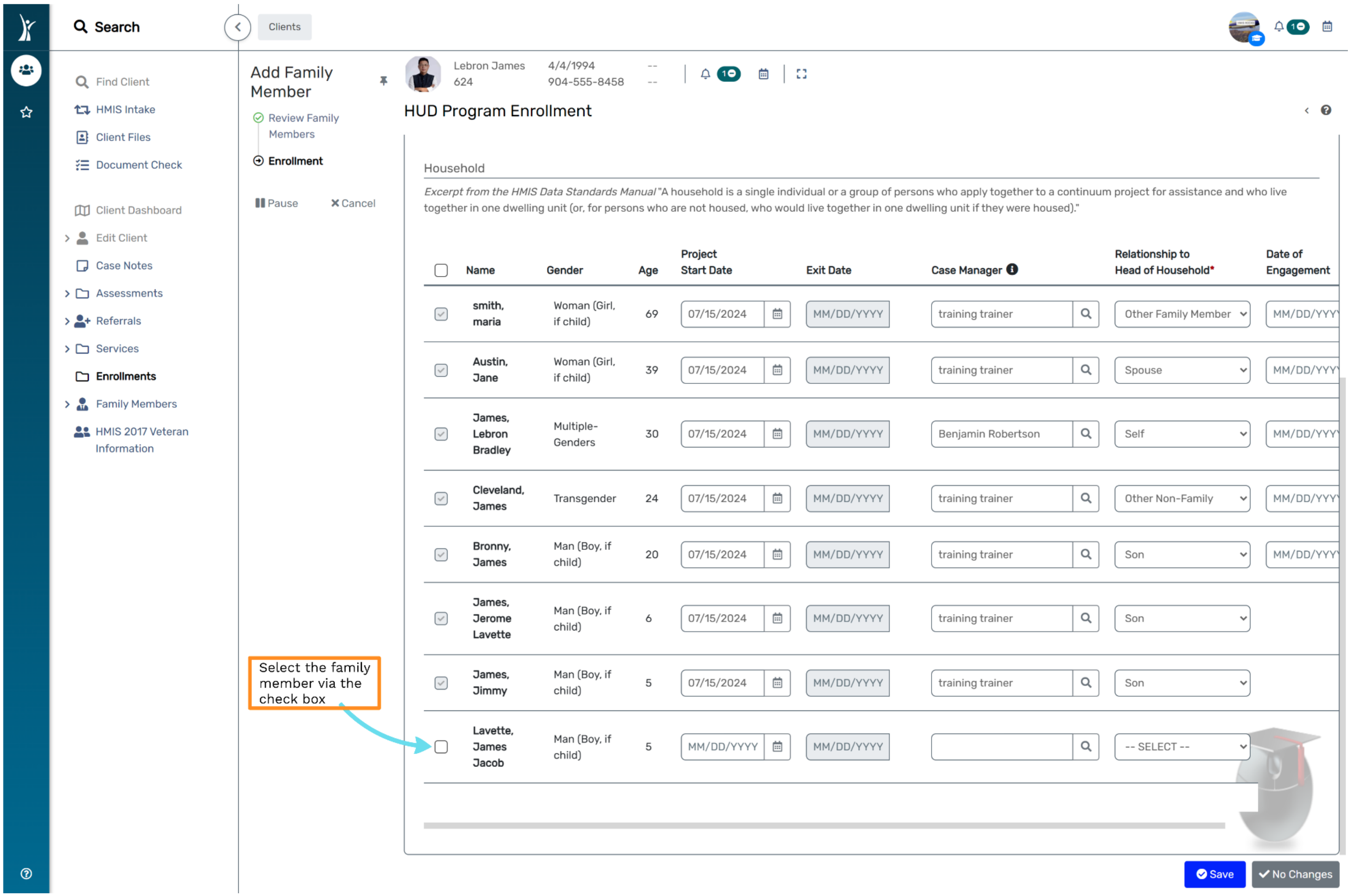
Adding Family Member – No Duplicate Found

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



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".



Adding Clients to Existing Enrollments – Select and 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*

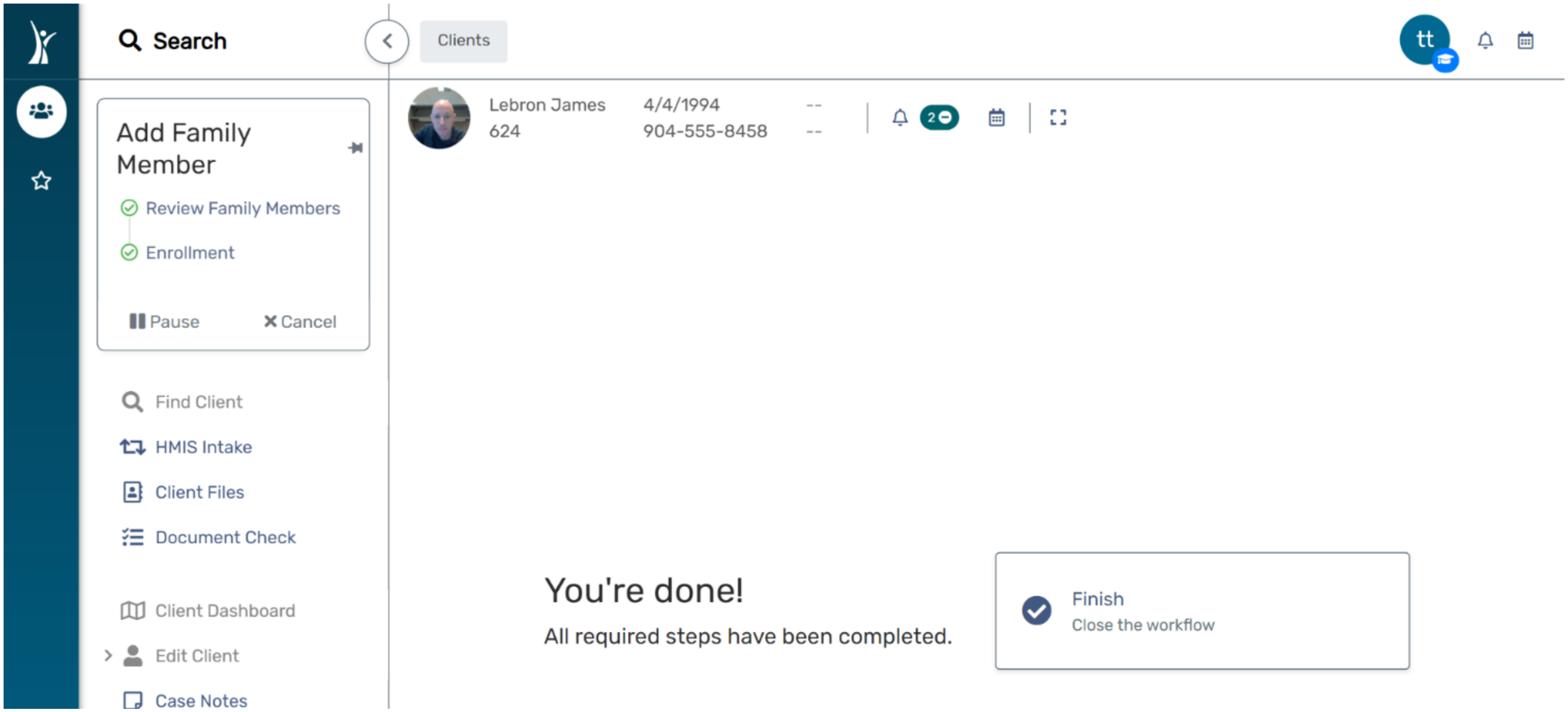
- There will be special cases when the enrollment date of the new family member may NOT be the same as the rest of the family. To verify which date to use, speak with your supervisor

Tips and Tricks – Enrolling New Family Members 1

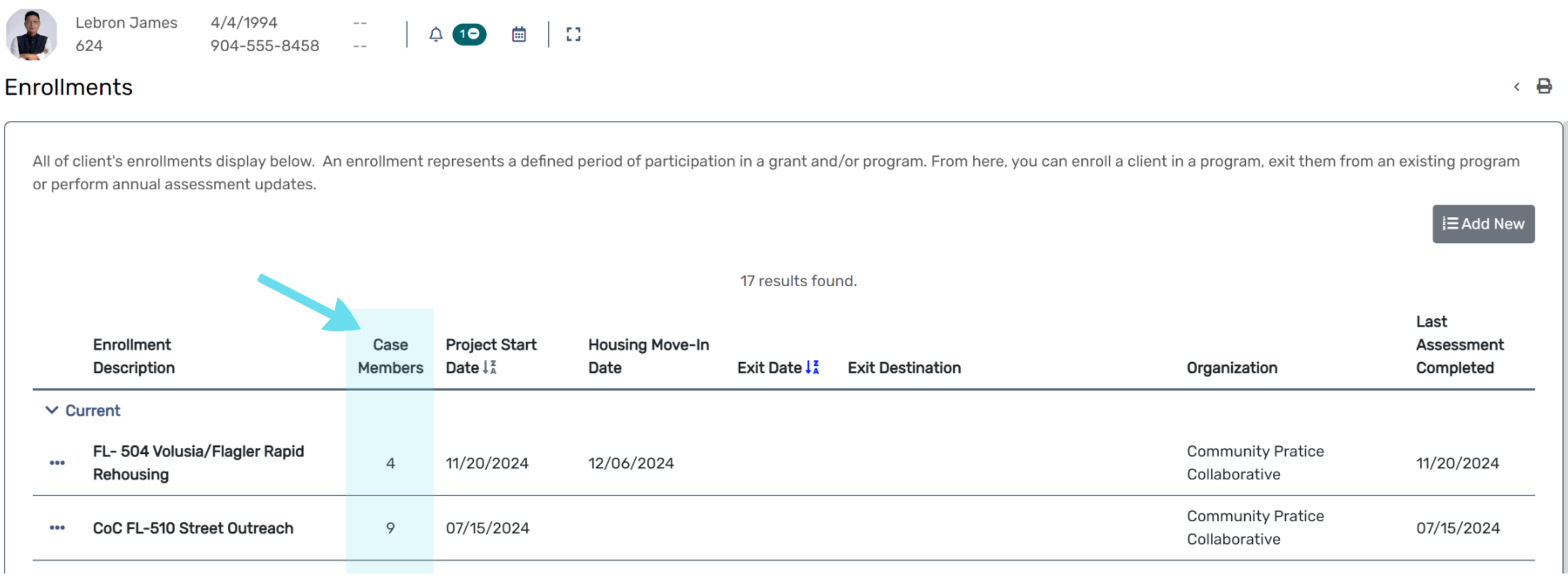
Tips and Tricks - *Enrolling New Family Members*

- 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



Adding a Family Member to an Existing Enrollment – Finish



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

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

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

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".

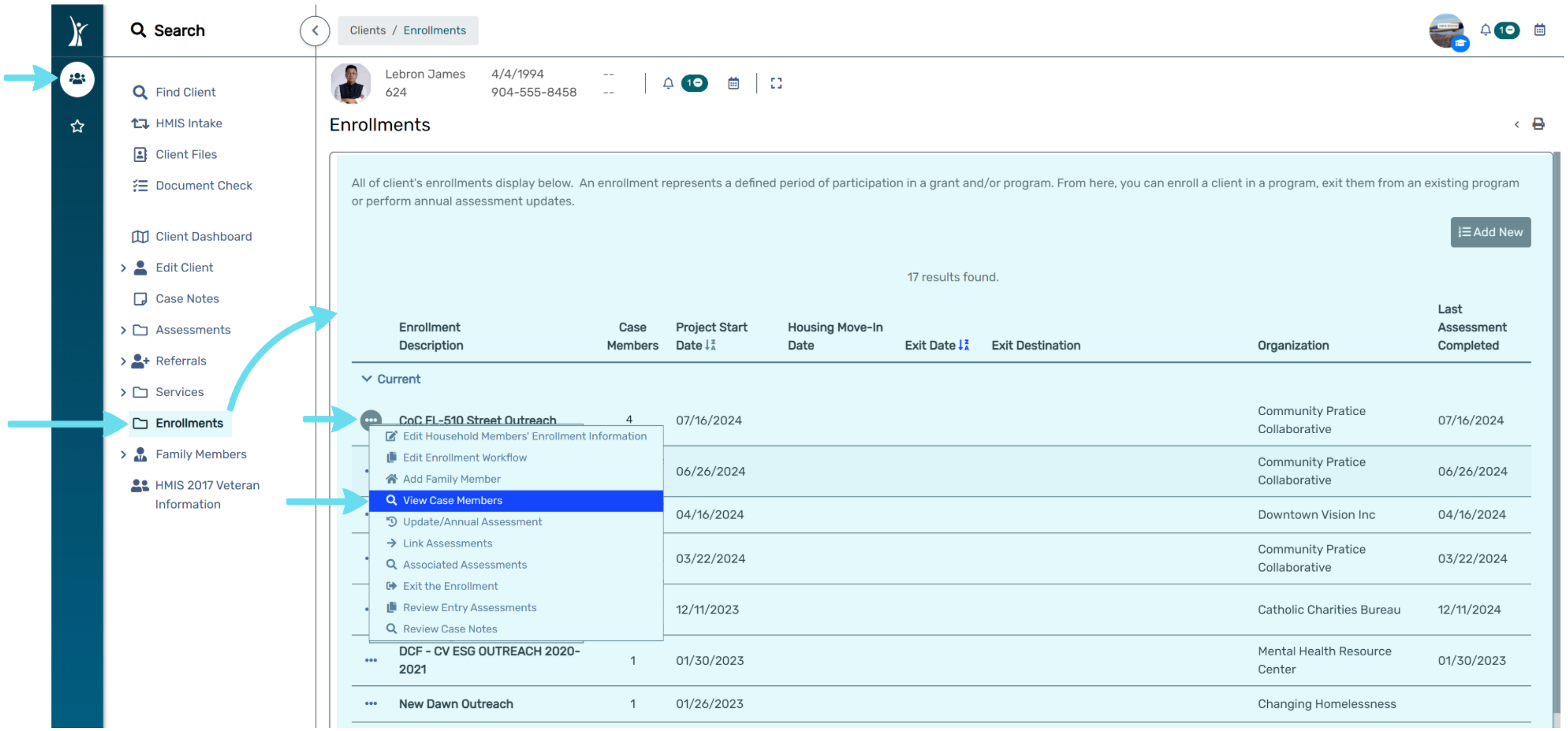
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* "HMIS Basic User 2025 Manual".

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".

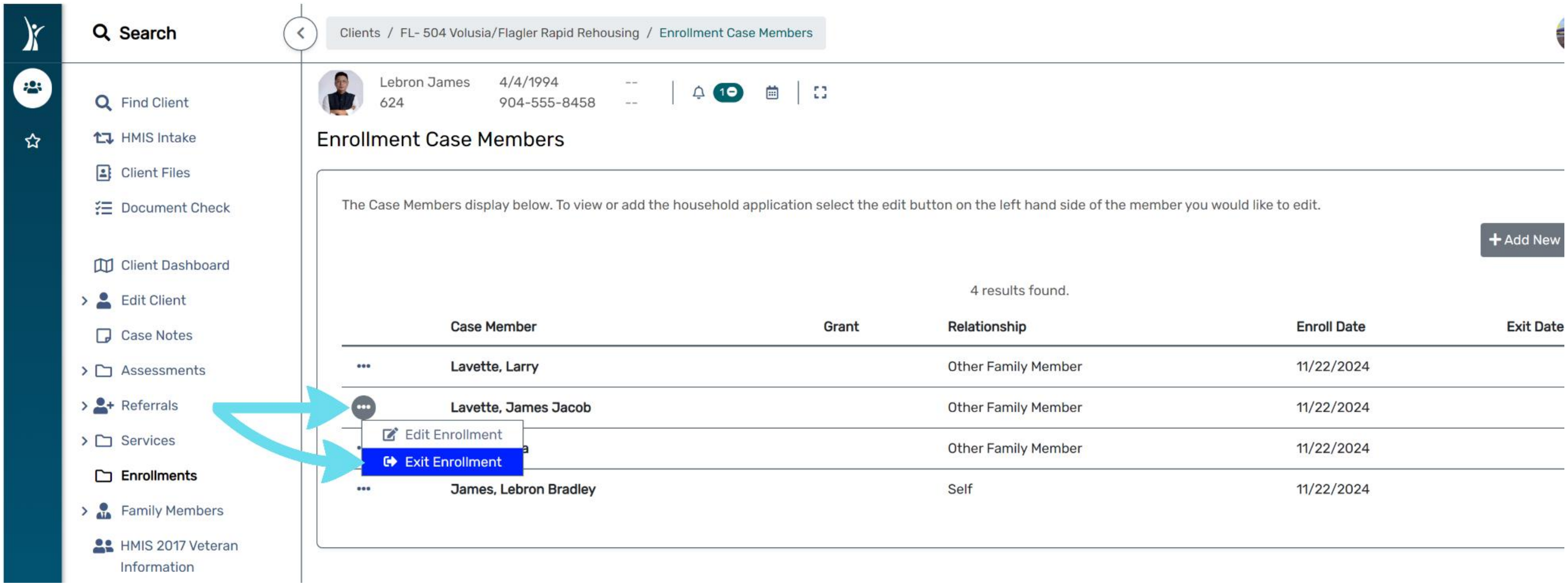
Step 3: Select the action button* next to the appropriate enrollment. Select "View Case Members". ClientTrack will navigate to the "Enrollment Case Members" workspace container.

** 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".



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.



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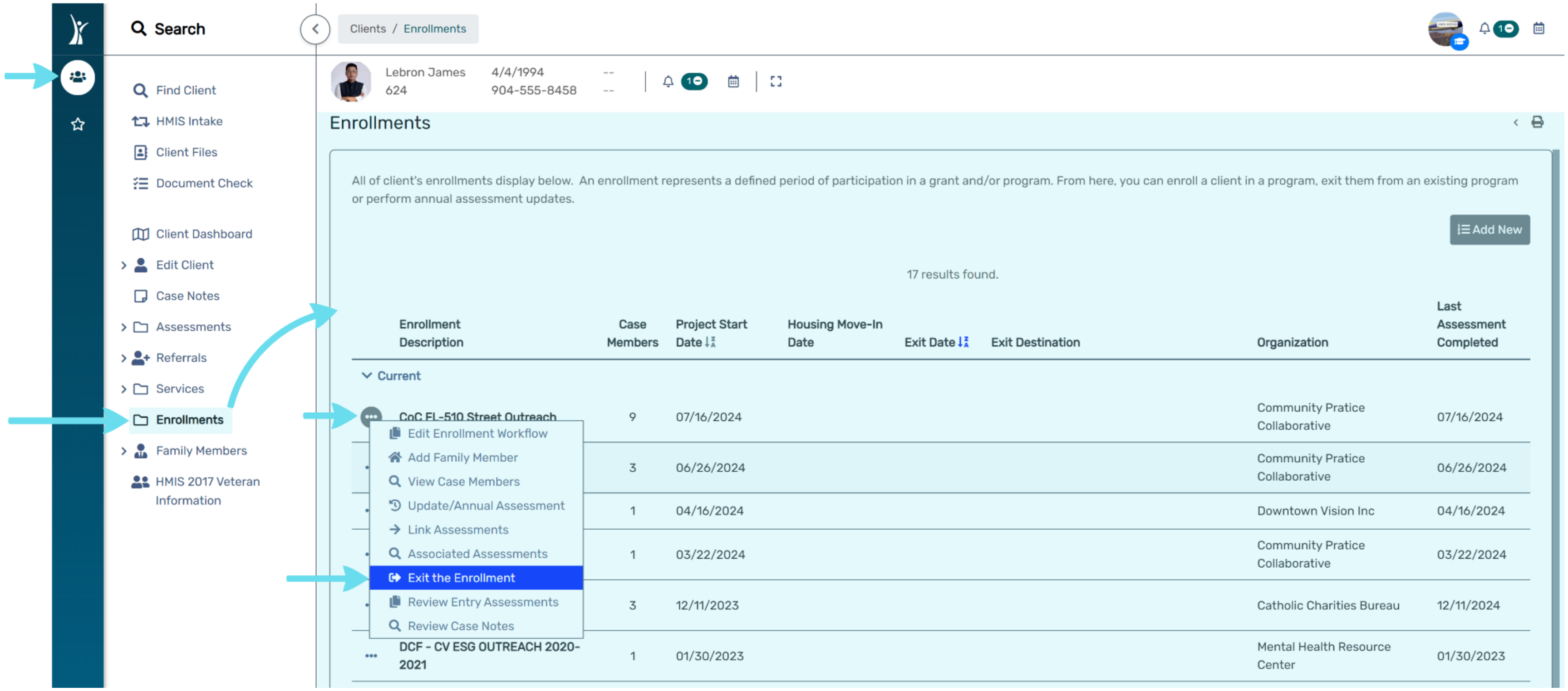
Step 2: Select the "Enrollments" secondary sidebar* menu option. ClientTrack will navigate to the "Enrollments" workspace container.

**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".



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".