

Editing Existing Enrollment: Editing Enrollment Dates

Enrollments are comprised of three components that all need to be dated on the same date to prevent data errors. The Program Enrollment (HUD Program Enrollment Page), the Entry Master Assessment*, and the Service** entered at enrollment.

* For information and instructions on regarding master assessments, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Master Assessments in the “HMIS Basic User 2025 Manual”.

** For information and instructions regarding Master Assessments, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Services: Folder

If an enrollment is still open: To update an incorrect enrollment date, use the “Edit Enrollment Workflow”. Dates will need to be changed throughout the enrollment workflow to be consistent with when the data was captured for the enrollment. *For assistance, reach out to hmis@changinghomelessness.org.*

If an enrollment is closed: Reach out to hmis@changinghomelessness.org, or the HMIS Systems Team for assistance on this.

Tips and Tricks - Editing Enrollments - Editing a Project Start Date/Enrollment Date



- In order for you to change an enrollment date, it is highly recommended that you go back and verify that the Entry Assessment and the Service entered at enrollment are also dated with the same date to avoid potential errors in reporting.

Tips and Tricks – Editing Enrollments – Editing a Project Start Date/Enrollment Date

Steps to Editing Existing Enrollment Dates

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”.*

Lebron's Enrollments							
<div> <div>Displaying 1-10 of 25 results.</div> <div> <div>Next</div> <div>Last</div> </div> </div>							
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	8	07/15/2024				Community Praticce Collaborative	07/15/2024
... ESG - Emergency Rental Assistance Program	3	06/26/2024				Community Praticce 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 Praticce 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	

Project start date

Project Start Date Column in Enrollments

Step 3: Select the action button* next to the appropriate enrollment. Select “Edit Enrollment Workflow”. ClientTrack will navigate to the “Basic Client Information” workflow** step in the 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”.

**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”.

Client Dashboard

Enrollments

Action Button

Edit Enrollment Workflow

Client Information: Lebron James, 624, 4/4/1994, 904-555-8458

Enrollments Section: 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 or perform annual assessment updates.

25 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization
CoC FL-510 Street Outreach	1	07/15/2024				Community Pratic Collaborative
CoC FL-510 Street Outreach	3	06/26/2024				Community Pratic Collaborative
Update/Annual Assessment	1	04/16/2024				Downtown Vision Inc
Link Assessments	1	04/11/2024				Catholic Charities Bureau
Associated Assessments	1	03/22/2024				Community Pratic Collaborative
Exit the Enrollment	1	03/11/2024				Catholic Charities Bureau
Review Entry Assessments	1	01/30/2023				Mental Health Resource Center
Review Case Notes	1	01/26/2023				Changing Homelessness

Edit Enrollment Workflow

Step 4: Click “No Changes” on the Basic Client Information workflow step. ClientTrack will navigate to the “Family Members” workflow step.

Step 5: Click “Save and Close” on the Family Members workflow step. ClientTrack will navigate to the “HUD Program Enrollment” workflow step.

Step 6: As applicable, edit the dates* in the “Project Start Date” column. (otherwise known as the Enrollment Date) by clicking in that field and selecting/typing in a different date.

**If there are multiple family members enrolled in the project, update project start dates of each applicable family member. Click “Save” to save changes. Click “No Changes” to exit the form without saving.*

Intake (2322) **HUD Program Enrollment**

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

Basic Client Information
Family Members
Program Enrollment

James, Lebron Bradley

Pause Cancel

Project: CoC FL-510 Street Outreach

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*	Date of Engagement
<input checked="" type="checkbox"/>	James, Lebron Bradley	Multiple-Genders	30	07/15/2024	MM/DD/YYYY	Benjamin Robertson	Self	MM/DD/YYYY

Project Start Date

Save

Save No Changes

Enrolment Workflow - Edit Project Start Date

Step 7: Navigate through the remainder of the entry workflow and update any assessment dates as applicable. If the dates are correct, select “No Changes” or “Save and Close” as needed.

Step 8: Click “Finish – Close the workflow” when prompted. The page will redirect to the “Client Dashboard” screen.

Tips and Tricks - Enrollments and Reporting



- Organizations, grants, programs, and enrollments, etc. are linked together in ClientTrack to streamline complex data. What seems as a simple enrollment is linked to many factors and changing any of those factors may cause data errors. Hence, updating workflows, etc. should always be performed with caution and supervision.

Tips and Tricks – Enrollments and Reporting

Step 9: Update Master Assessment Date: The Master Assessment* (Entry assessment) needs to be completed/dated the same as the Project Start Date. To do this, click on the correct enrollment. Navigate back to enrollments. Click the action button and select “Review Entry Assessments” menu option on the left panel.

**For instructions on how to navigate to entry assessments, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Master Assessments/Viewing Client Master Assessments in the “HMIS Basic User 2025 Manual”.*

