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

<u>Steps to Editing Existing Enrollment Dates</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".***

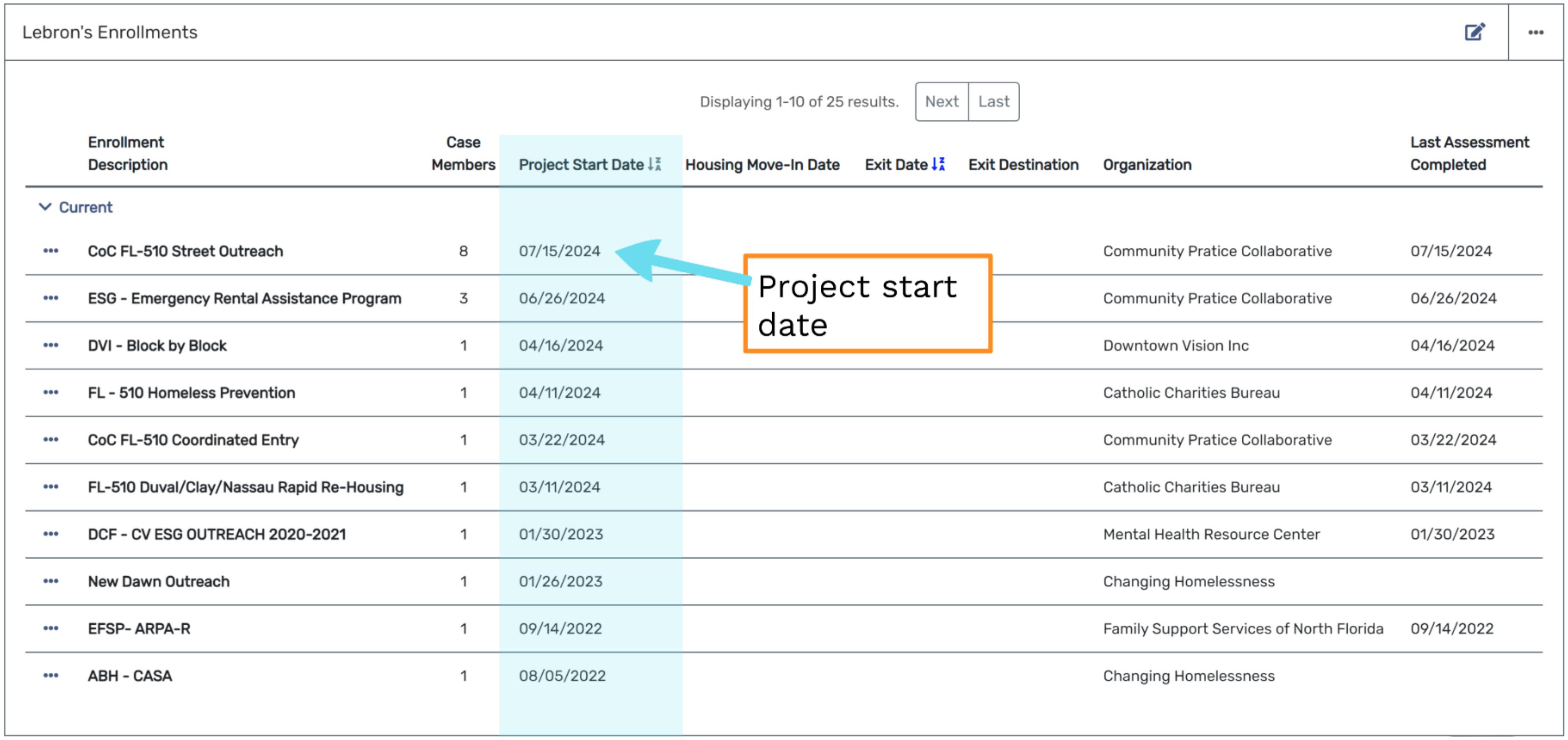
* *For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/*Quick Search *in the* "HMIS Basic User 2025 Manual".

** *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".

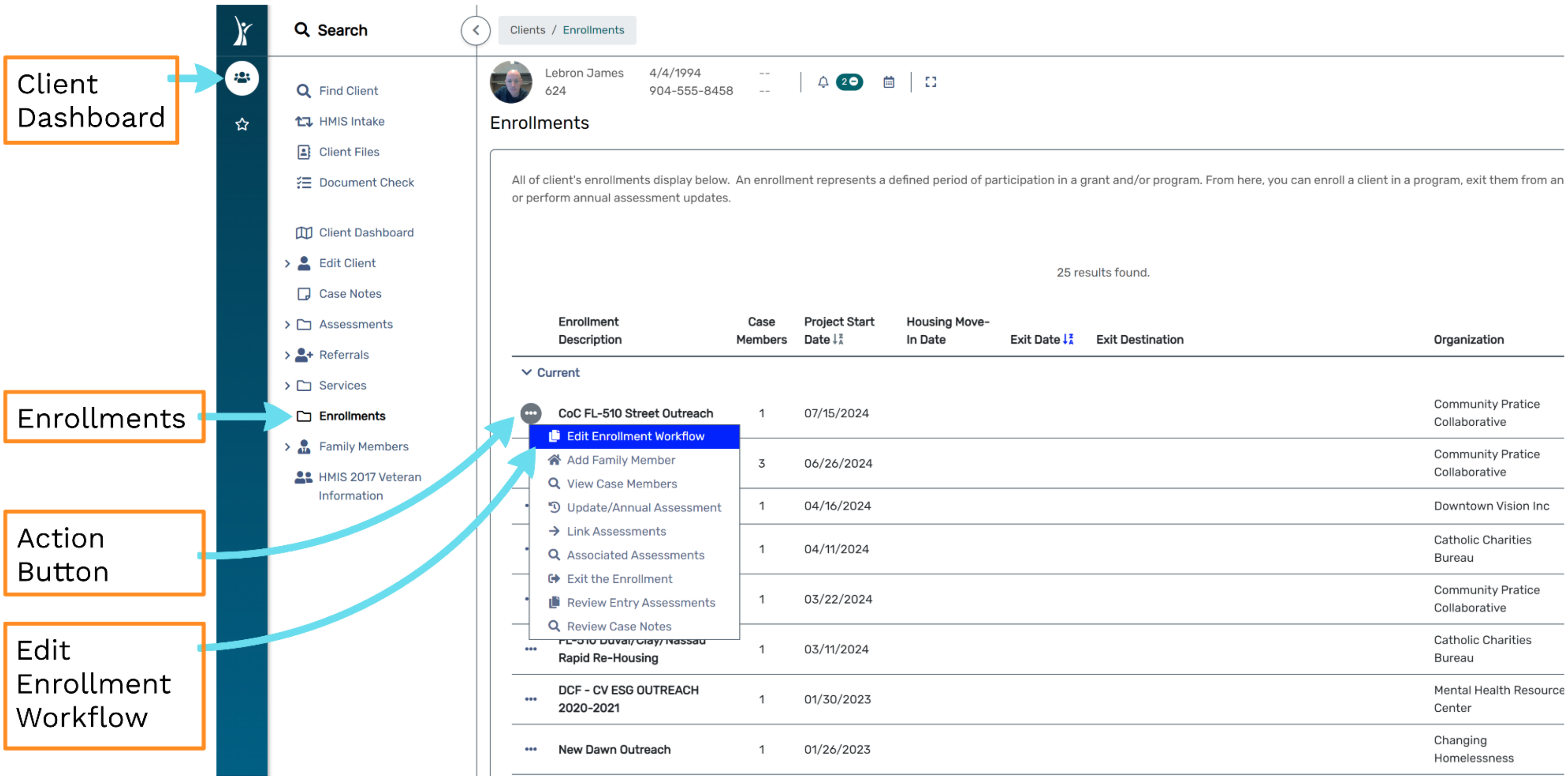


Project Start Date Column in Enrollments

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”.



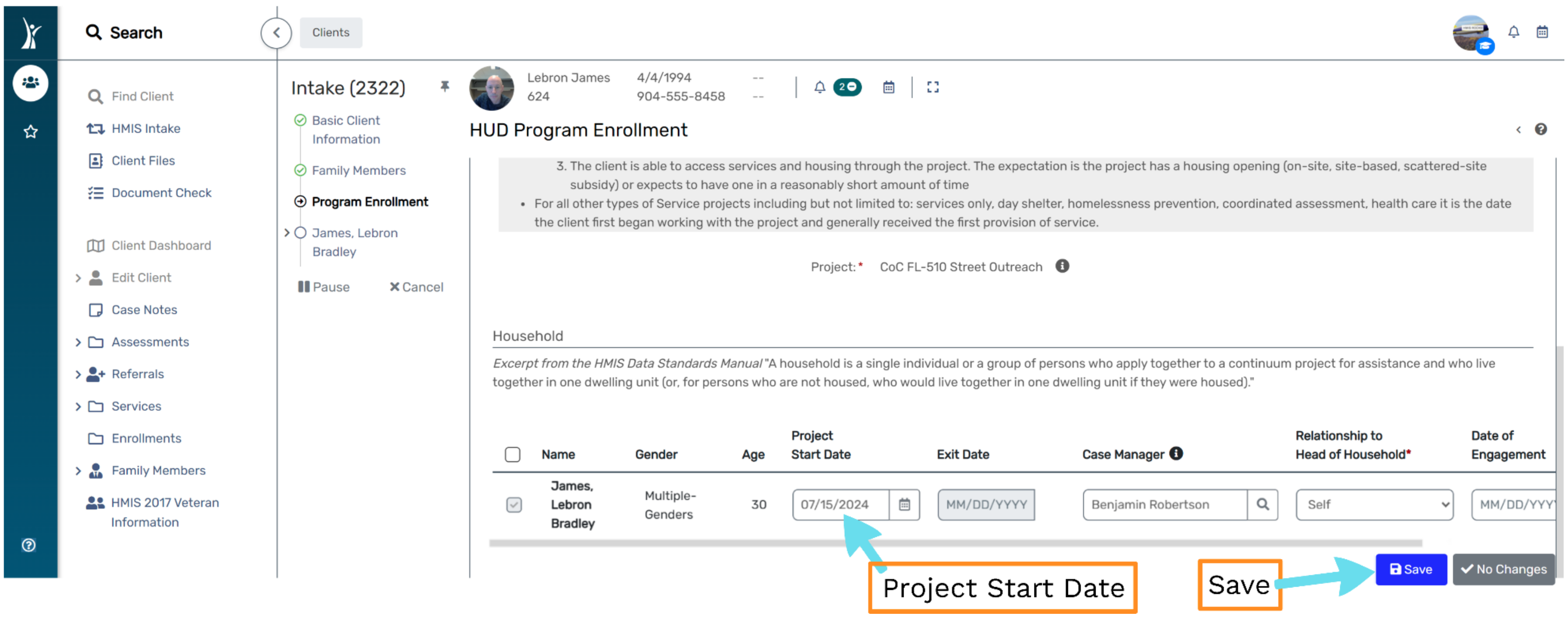
Edit Enrollment Workflow

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.*



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.

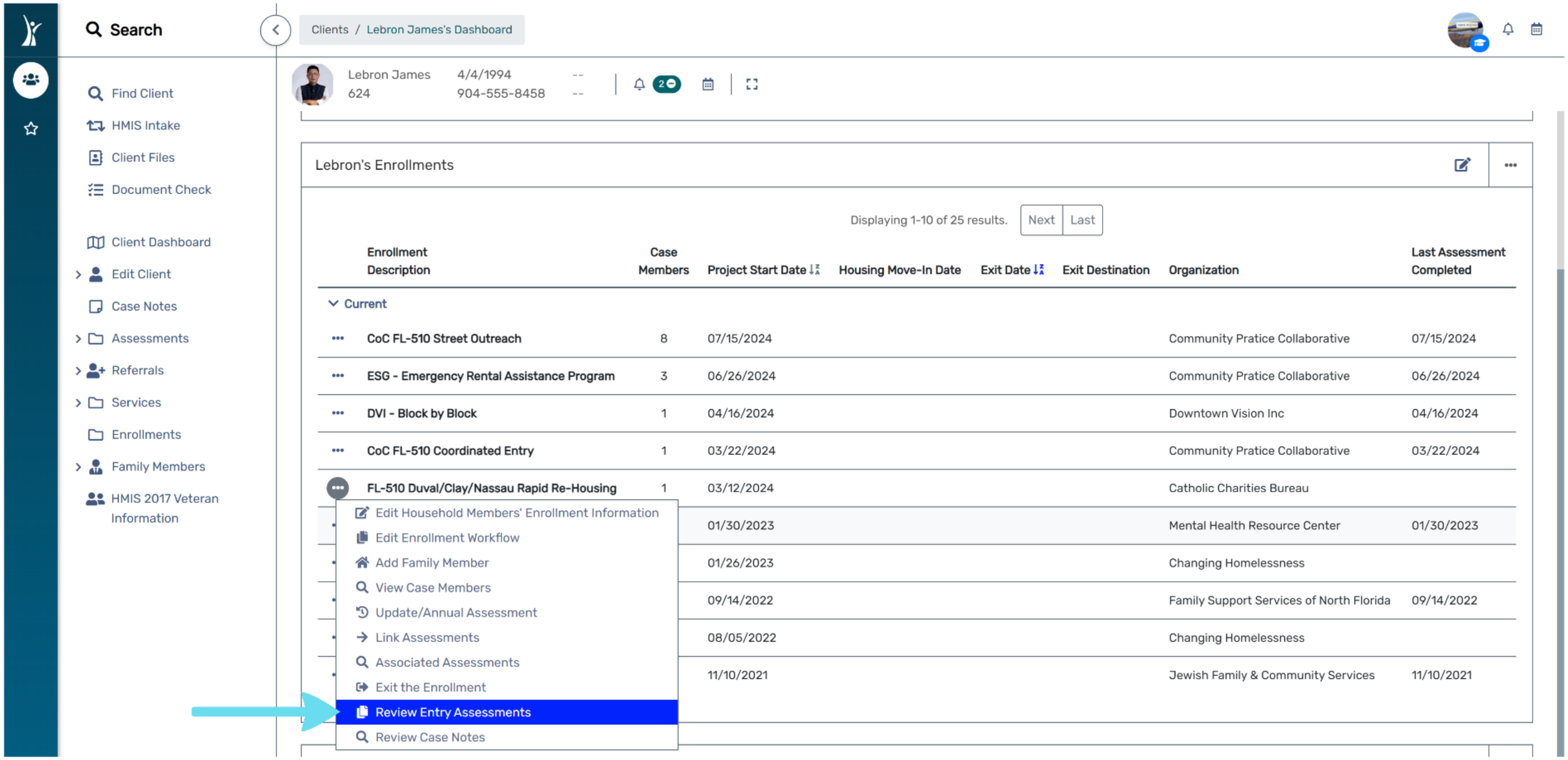
Tips and Tricks - *Enrollments and Reporting*

- 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 performend with caution and supervision.

Tips and Tricks – Enrollments and Reporting

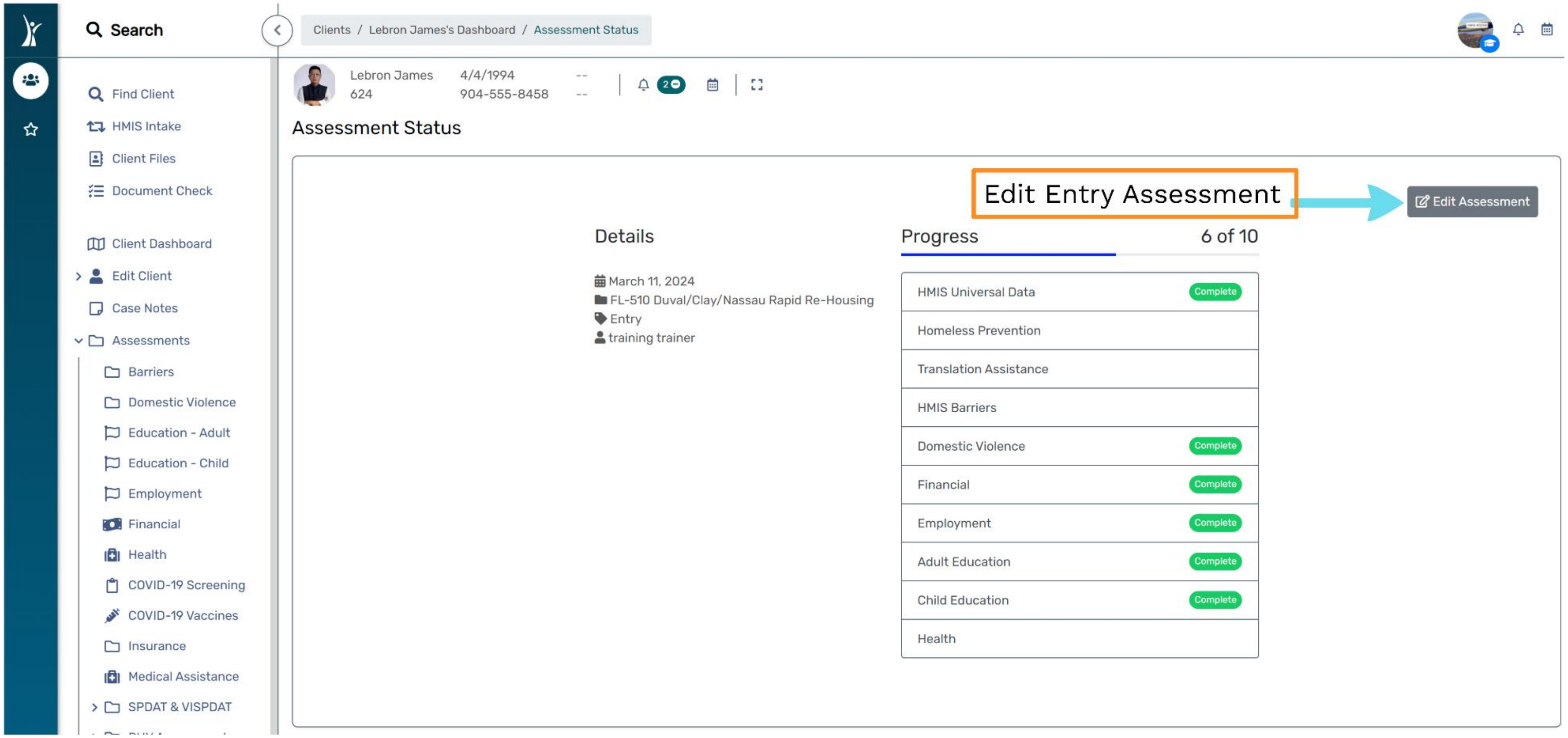
Step 9: Update Master Assessment Date: The Master Assessment* (Entry assessment) needs to be completed/dated the same as the Project Start Date. To do this, click on the correct enrollment. Navigate back to enrollments. Click the action button and select "Review Entry Assessments" menu option on the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



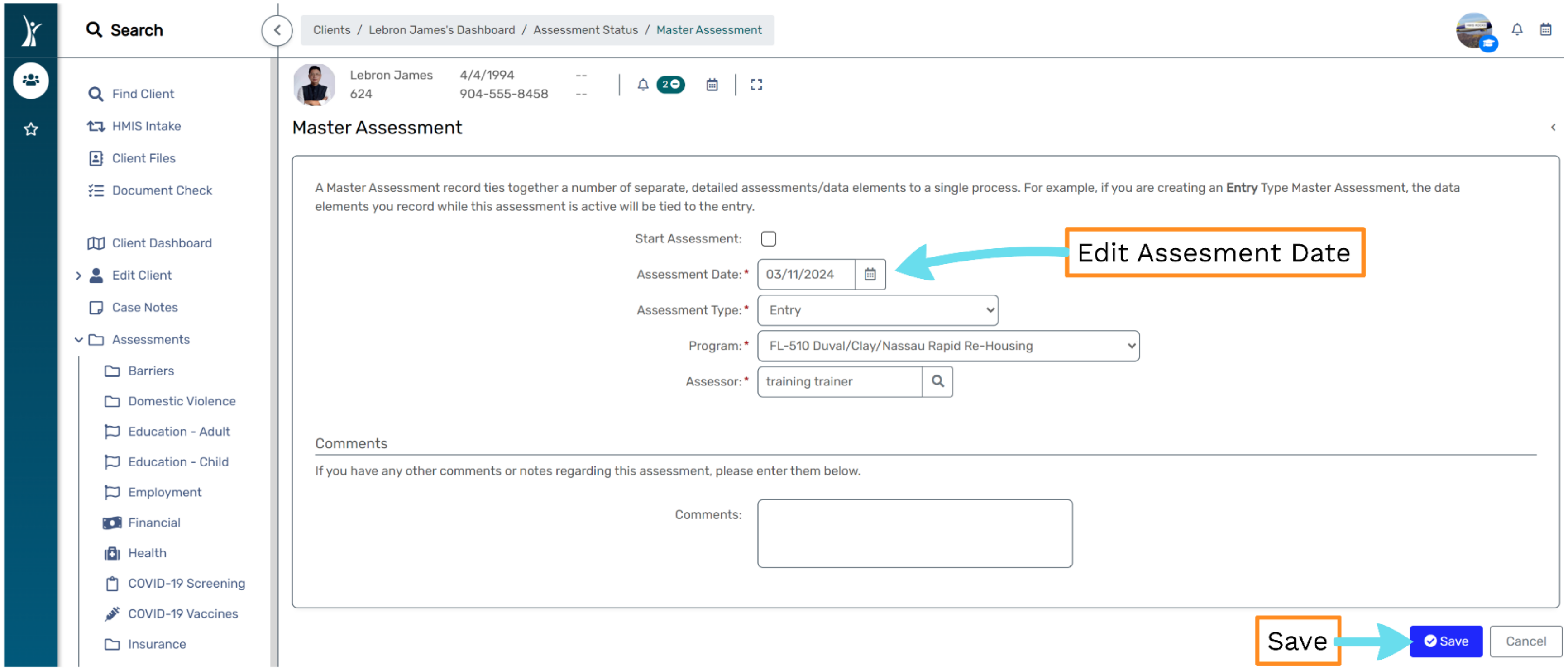
Review Entry Assessments

Step 10: ClientTrack will navigate to a list of available and completed assessments. Select "Edit Assessment" to open the Entry Assessment.



Edit Master Assessment

Step 11: Edit the Assessment date to the correct/accurate date. Click "Save". ClientTrack will navigate back to the "Assessment Status" page.



Edit Master Assessment Date