

HMIS Exits

This section will overview basic navigation and anatomy of exit workflows. For details about specific programs, reach out to your supervisor(s) or email hmis@changinghomelessness.org.*

The “Exit the Enrollment” dropdown item will initiate the “HUD Program Exit” workflow**. Use this function to exit a client from an enrolled program.

** For basics regarding general data input for workflows, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows in the “HMIS Basic User 2025 Manual”.*

*** For online tutorials on general intake enrollments, scan the QR code*** in this section or visit chiedconnect.net and navigate to the HMIS How-To self-enrolled course, and select “Enrollment Tutorials”.*

**** For information regarding online resources, see Introduction/Online Resources in the “HMIS Basic User 2025 Manual”.*



QR – Enrollment Tutorials

Steps to Navigate to the “HMIS Intake” Folder Menu

Step 1: Navigate to the Client 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 applicable client - ClientTrack will open the last client accessed by default. To search for and select another client, use either the “Quick Search*” option or the “Find Client**” option in the secondary sidebar*** menu option.

** 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](#)”.*

****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](#)”.*

Tips and Tricks - “*Best Practices to Search for Clients*” and Preventing Duplicates



**[Click here](#) for best practices when searching for clients, see the “Best Practices to Search for Clients” PDF.*

Step 3: Initiate the enrollment exit – When selecting a profile, ClientTrack will default to the Client Dashboard*. Locate the applicable enrollment via the client’s Enrollments folder located in the secondary sidebar** or via the Enrollment.

* To view enrollments through the “Client Dashboard, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Client Dashboard: Folder in the “[HMIS Basic User 2025 Manual](#)”

** Client Enrollments: To learn how to navigate to the “Enrollments” folder, see Chapter 4: Client Workspace Menu Options, Folders, and Subfolders /Enrollments: Folder in the “[HMIS Basic User 2025 Manual](#)”.

The screenshot displays the ClientTrack interface. On the left is a dark blue sidebar with a search bar and a list of navigation items: Find Client, HMIS Intake, Client Files, Document Check, Client Dashboard, Edit Client, Case Notes, Assessments, Referrals, Services, Enrollments, Family Members, and HMIS 2017 Veteran Information. A red arrow points to the 'Enrollments' folder. The main content area shows the 'Enrollments' page for client Jett Howard. It includes a table with columns: Enrollment Description, Case Members, Project Start Date, Housing Move-In Date, Exit Date, Exit Destination, Organization, and Last Assessment Completed. The table lists three enrollments. A red arrow points to the 'Enrollments' folder in the sidebar, and another red arrow points to the 'Exit the Enrollment' option in the context menu that appears when clicking on the first enrollment row.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
RRH Training Program	2	08/29/2025	09/08/2025			Training Org	08/29/2025
		08/05/2025	08/08/2025			Community Practice Collaborative	08/05/2025
		08/05/2025		08/05/2025	Rental by client, with ongoing housing subsidy	Community Practice Collaborative	08/05/2025

ClientTrack will navigate to the “Enrollment Exit” workspace container.

HMIS Exit Workflow Anatomy

The screenshot displays the HMIS Exit Workflow interface. On the left is a dark blue sidebar with navigation icons and a list of menu items: Client Dashboard, Edit Client, Case, Assessments, Referrals, Services, Enrollments, Family Members, and HMIS 2017 Veteran Information. The main header area includes a search bar, a back arrow, and a breadcrumb trail: Clients / RRH Training Program. Below the header, a light blue box titled 'HUD Program Exit' contains two radio buttons: 'Exit Enrollment' (selected) and 'Exit Assessments'. Below these are 'Pause' and 'Cancel' buttons. Three orange callout boxes with blue arrows provide instructions: 'Example of a general workflow progress bar' points to the 'Exit Enrollment' radio button; 'Pause a current workflow (saved under Client Workspace/ Paused operations)' points to the 'Pause' button; and 'Cancels workflow (Changes will not be saved)' points to the 'Cancel' button. The right side of the interface shows the 'Enrollment Exit' form. It begins with the instruction: 'To exit the client from the Enrollment, enter the Exit Date and Destination.' Below this are fields for 'Exit Date:' (09/15/2025), 'Destination:' (-- SELECT --), and 'Exit Reason:' (-- SELECT --). Further down are 'Case Manager Assignment:' (Michael Holbrook) and 'End Case Assignment:' (checked). At the bottom, there is a 'Housing Move-in Date:' field (09/08/2025) and a section for 'Services' with an 'Add Quick Services:' checkbox.

Search

Find Client

Client Dashboard

Edit Client

Case

Assessments

Referrals

Services

Enrollments

Family Members

HMIS 2017 Veteran Information

HUD Program Exit

Exit Enrollment

Exit Assessments

Pause

Cancel

Enrollment Exit

To exit the client from the Enrollment, enter the Exit Date and Destination.

Exit Date: 09/15/2025

Destination: -- SELECT --

Exit Reason: -- SELECT --

Case Manager Assignment: Michael Holbrook

End Case Assignment: ☒

Housing Move-in Date: 09/08/2025

Services

Add Quick Services: ☐

Example of a general workflow progress bar

Pause a current workflow (saved under Client Workspace/ Paused operations)

Cancels workflow (Changes will not be saved)

Step 4: Navigate through the exit enrollment workflow

Navigate through the exit workflow as applicable*. If applicable, backdate any forms and assessment dates.

**Different project and program types may require specific Program Specific Data Elements.*