

## Enrollment Entry for ClientTrack (Existing Clients)

First, locate the client you wish to enroll into a program. Once that client is located, select **“Intake”**. Once **“Intake”** is selected you will select **“Use the Current Client.”**

The screenshot shows the ClientTrack interface. On the left is a sidebar with a search bar and a list of navigation items: Dashboard, Find Client, Intake (highlighted with a blue arrow), COVID-19 Intake, COVID-19 Vaccine Intake, Profile, Profile, Alias History, Client Photo, Release of Information, Document Check, Case Notes, Client Files, and Current Living Situation. The main area displays the 'Intake (2322)' form for client 'Pancake, Strawberry' with ClientID 9977. The 'Add or Edit' section has three radio buttons: 'Basic Client Information' (selected), 'Family Members', and 'Program Enrollment'. Below these are 'Pause' and 'Cancel' buttons. A modal dialog titled 'Add or Edit' asks 'Do you want to add a new client or use the selected client?'. It has three buttons: 'Add a new client', 'Use the current client' (highlighted with a blue arrow), and 'Select another client'.

The Client Information page will populate next, this information will already be completed due to the client is already an existing client in the ClientTrack system. If information is already provided, please review the information with the client to verify their client information is accurate. If accurate, please select **“Finish”**.

The screenshot shows the 'Client Information' page for client 'Pancake, Strawberry' with ClientID 9977. The 'Basic Client Information' section is active. It contains a text box for 'First Name' with 'Strawberry' entered, 'Last Name' with 'Pancake', 'Middle Name' (empty), 'Suffix' (empty), and 'Alias' (empty). The 'Name Quality' dropdown is set to 'Full name reported'. The 'Social Security Number' field shows '555 - 66 - 2468'. Below this is the 'Basic Client Demographics' section. At the bottom right, there is a blue arrow pointing to a 'Finish' button.

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The Family Members page will populate next, this page is where you will verify all household members and add additional household members that may not be already provided. If all household members are listed, you may **“Save & Close”**

The screenshot shows the 'Family Members' section for client 'Pancake, Strawberry'. The page includes a sidebar with navigation options like 'Dashboard', 'Find Client', 'Intake', and 'Profile'. The main content area displays the client's information and a list of family members. A blue arrow points to the 'Save & Close' button at the bottom right.

First Name*	Middle Name	Last Name*	Suffix	Name Quality*
<input checked="" type="checkbox"/>	Orange	Pancake		Full name reported

If you need to add a household member, you will locate the next available entry section and select the search icon.

The screenshot shows the 'Family Members' section for client 'Pancake, Strawberry'. The page displays a list of family members with four entries. A blue arrow points to the search icon next to the last entry.

First Name*	Middle Name	Last Name*	Suffix	Name Quality*
<input checked="" type="checkbox"/>	Strawberry	Pancake		Full name reported
<input checked="" type="checkbox"/>	Blueberry	Pancake		Full name reported
<input checked="" type="checkbox"/>	Berry	Pancake		Full name reported
<input checked="" type="checkbox"/>	Jackson	Pancake		Full name reported
<input checked="" type="checkbox"/>				-- SELECT --

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You must search the household member first to verify if they are already an existing client.

If they are not an exiting client, you will then enter the household members' information section by section. Make sure to completely enter all data fields. This includes **Frist name, Last name, Name Quality, Date of Birth, Birth Date Quality, Gender, SSN, Relationship to Head of Household, Veteran status (if not a minor), Race/Ethnicity**. All fields should never be selected as “data not collected” you must attempt to obtain all data element fields. If the client does not know or refused, you may select those answer fields in the quality sections. Scroll left to right to access additional entry fields. “Save and Close” once completed.

<input type="checkbox"/>	First Name*	Middle Name	Last Name*	Suffix	Name Quality*
<input checked="" type="checkbox"/>	Blueberry		Pancake		Full name reported
<input checked="" type="checkbox"/>	Berry		Pancake		Full name reported
<input checked="" type="checkbox"/>	Jackson		Pancake		Full name reported
<input checked="" type="checkbox"/>					-- SELECT --

Blue arrows point to the search icon in the last row and the search icon in the last row.

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You will be taken to the HUD Program Enrollment page where you will select the specific program the client is being enrolled into. *Only your organization's projects will populate.*

**Intake (2322) \* Pancake, Strawberry** 1/17/2004 ClientID 9977

**HUD Program Enrollment**

The Project Start Date is:

- For **Street Outreach** projects – it is the date of first contact with the client.
- For **Emergency Shelters** – it is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without “exiting and restarting” for each stay for a specified period.
- For **Safe Havens** and **Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
- For all types of **Permanent Housing**, including **Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
  1. Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered)
  2. The client has indicated they want to be housed in this project
  3. The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time
- For all other types of Service projects including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: **HCPC - HOME**

Next, scroll down to “Household” you will check mark the head of household and all household members that are being enrolled into this program. If you need to backdate the enrollment, please make sure to backdate on this page under “Project Start Date” or you will need to change every day moving forward.

**Intake (2322) \* Pancake, Strawberry** 1/17/2004 ClientID 9977

**HUD Program Enrollment**

Project: **HCPC - HOME**

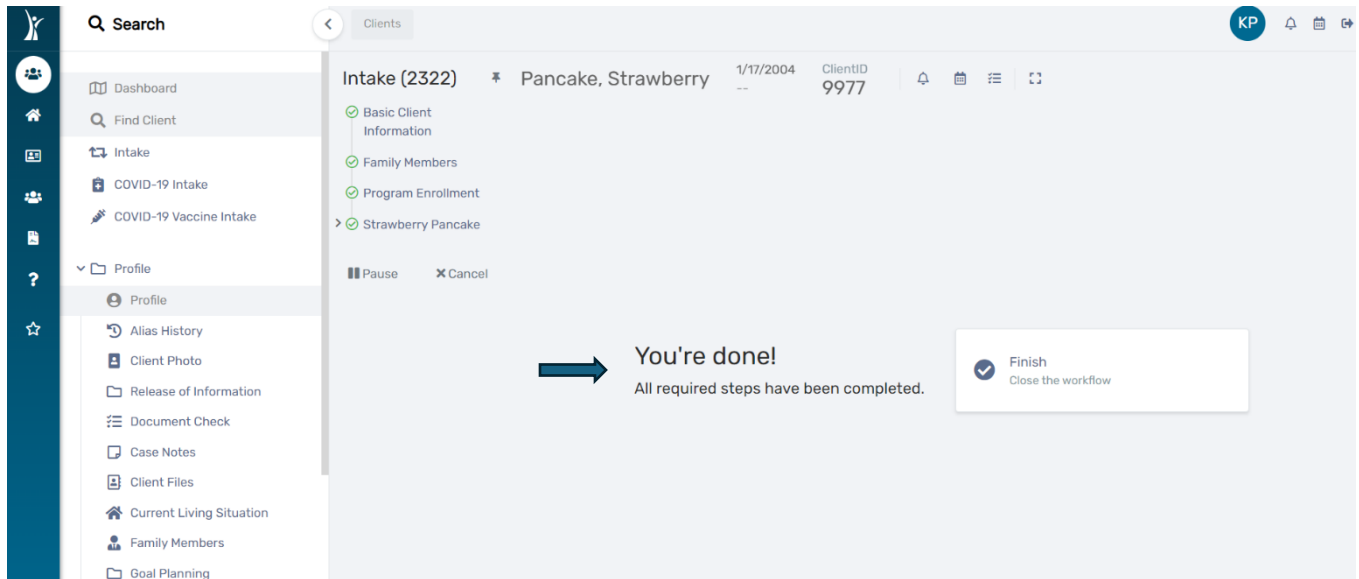
**Household**

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).”

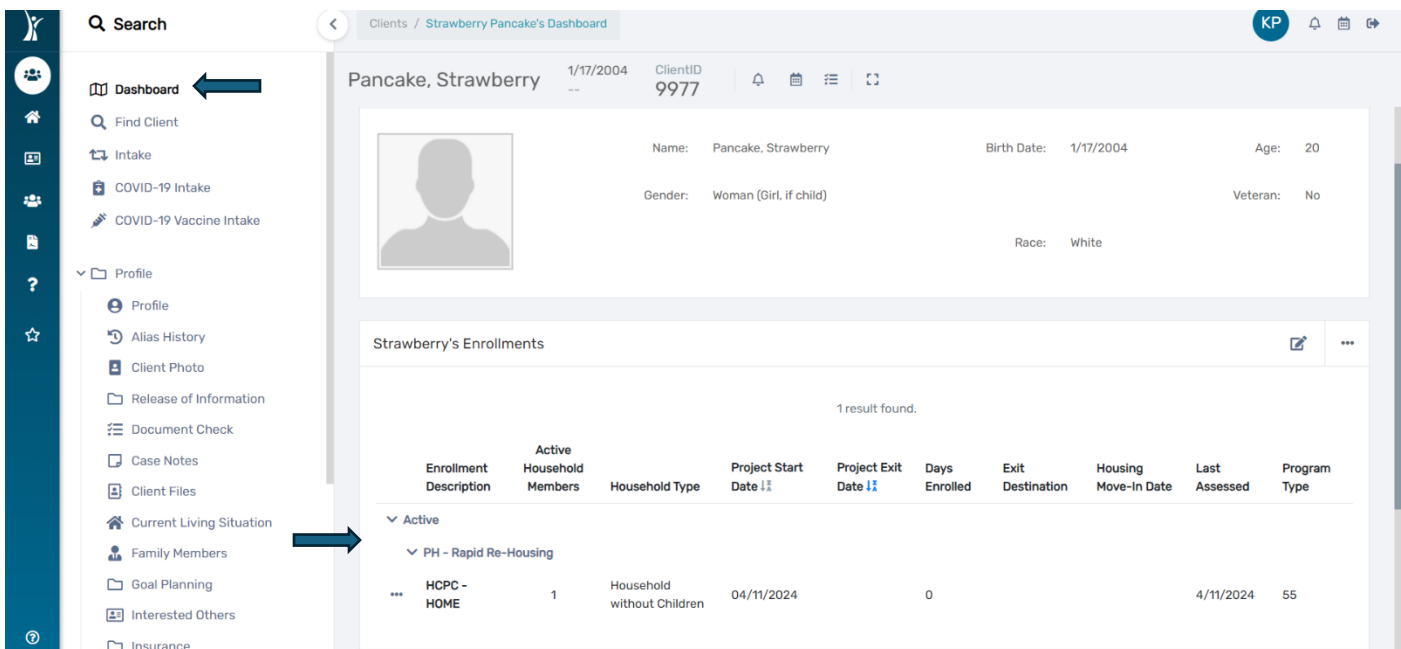
<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Exit Date	Case Manager
<input checked="" type="checkbox"/>	Pancake, Orange	Woman (Girl, if child)	24	04/11/2024	MM/DD/YYYY	Katrina Panzica
<input checked="" type="checkbox"/>	Pancake, Raspberry	Transgender	23	04/11/2024	MM/DD/YYYY	Katrina Panzica

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Once you select save and close, a workflow will populate for each family member. Each workflow will be slightly different based off the Project Type. Make sure to answer all requested data fields for each family member. Once completed you will finish on a page that says “You’re Done!”



To verify if the client is successfully enrolled into the program, you will locate the client's dashboard and Active Enrollments. As we can see below Strawberry is now successfully enrolled in the “HCPC – HOME Program”.



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