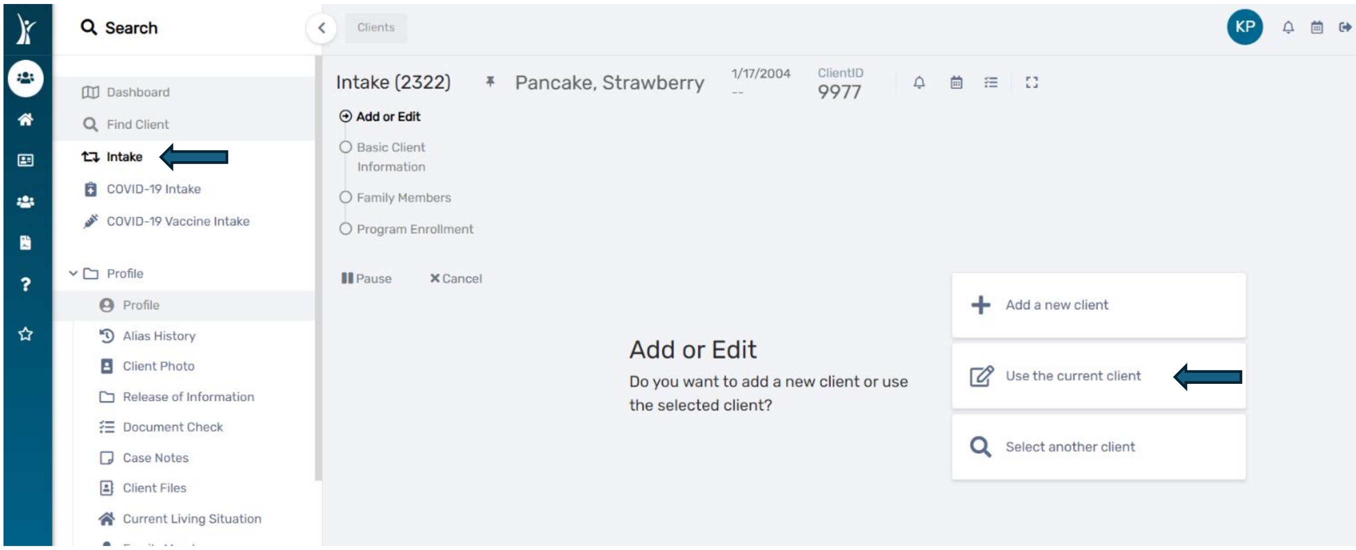
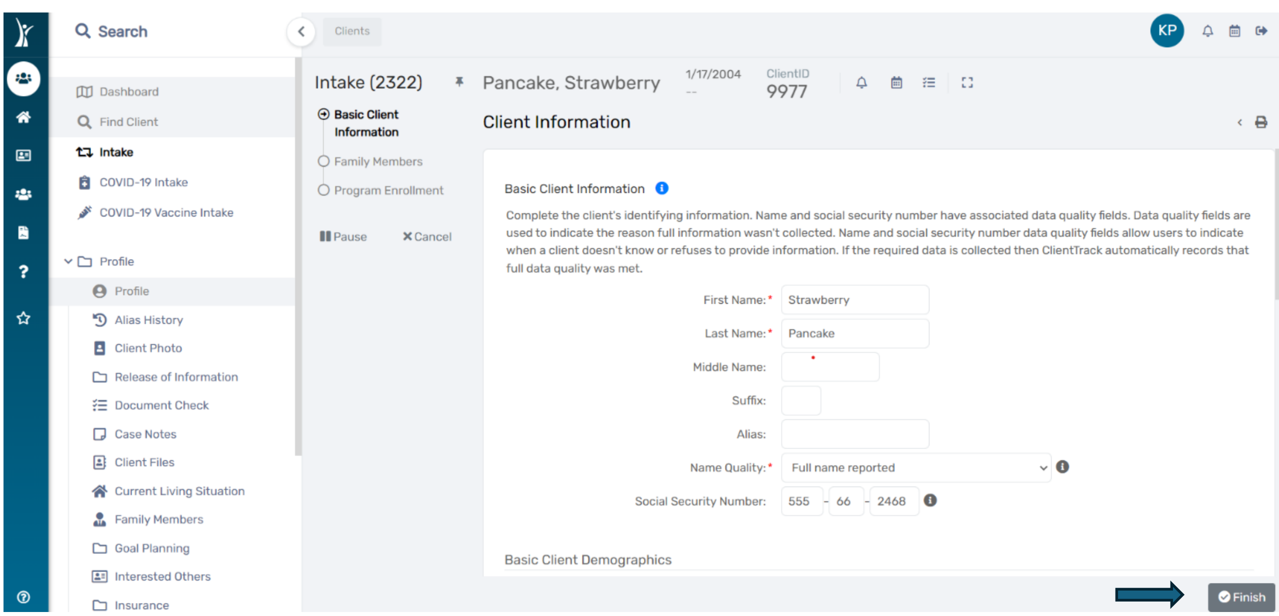
Enrollment Entry for ClientTrack (Existing Clients)

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 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".



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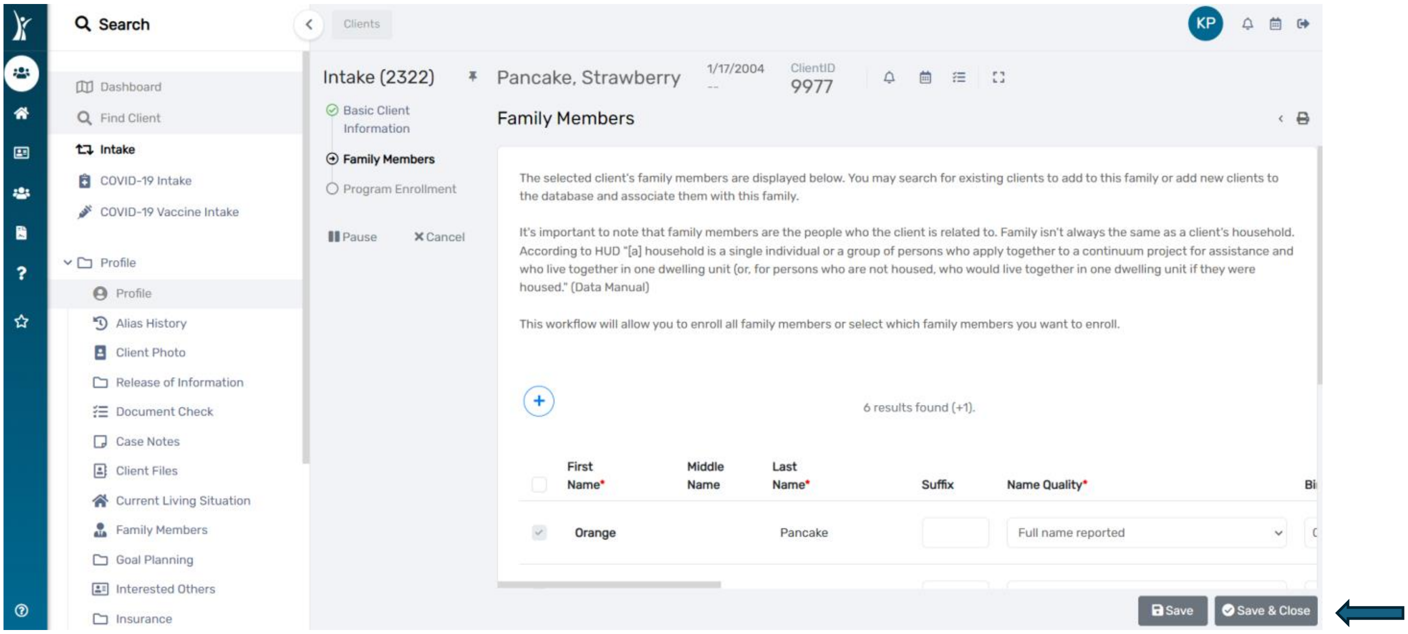
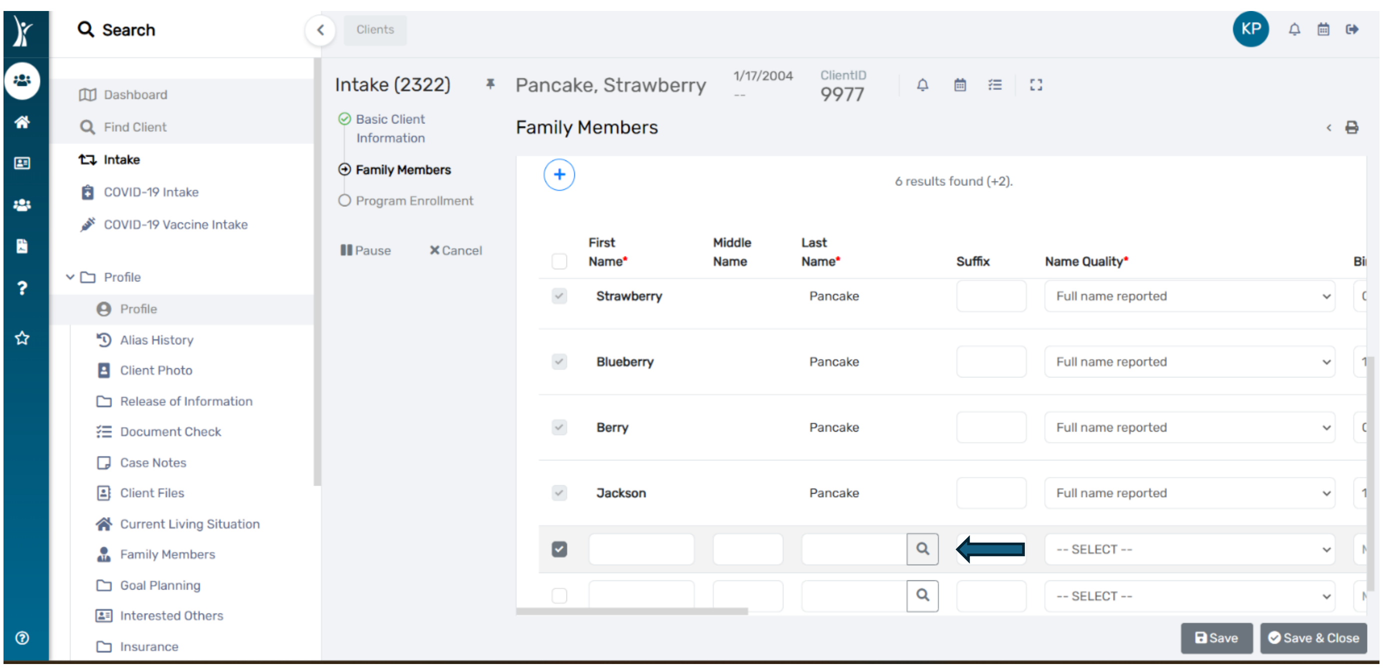
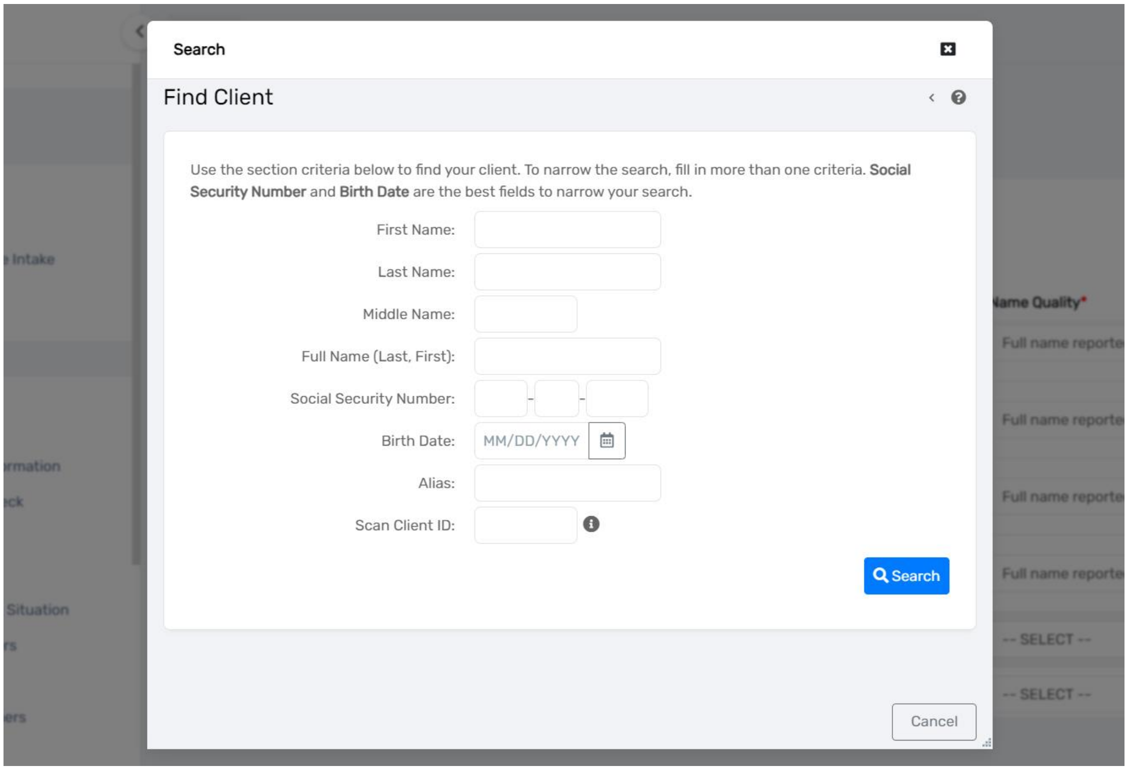
The Family Members page will populate next, this page is where you will verify all household members and add additional household members that may not be already provided. If all household members are listed, you may "**Save & Close**"



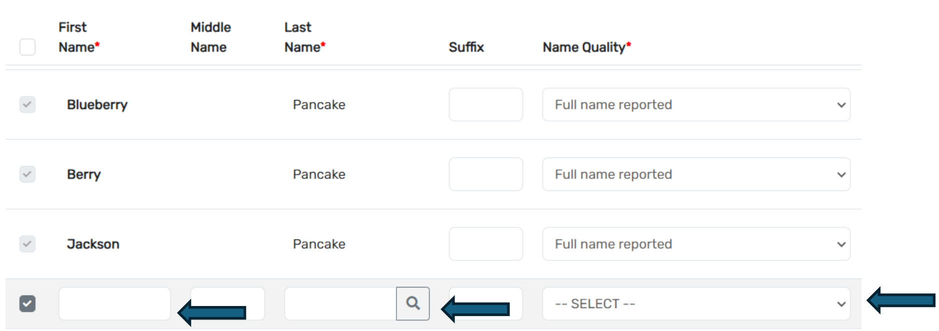
If you need to add a household member, you will locate the next available entry section and select the search icon.



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

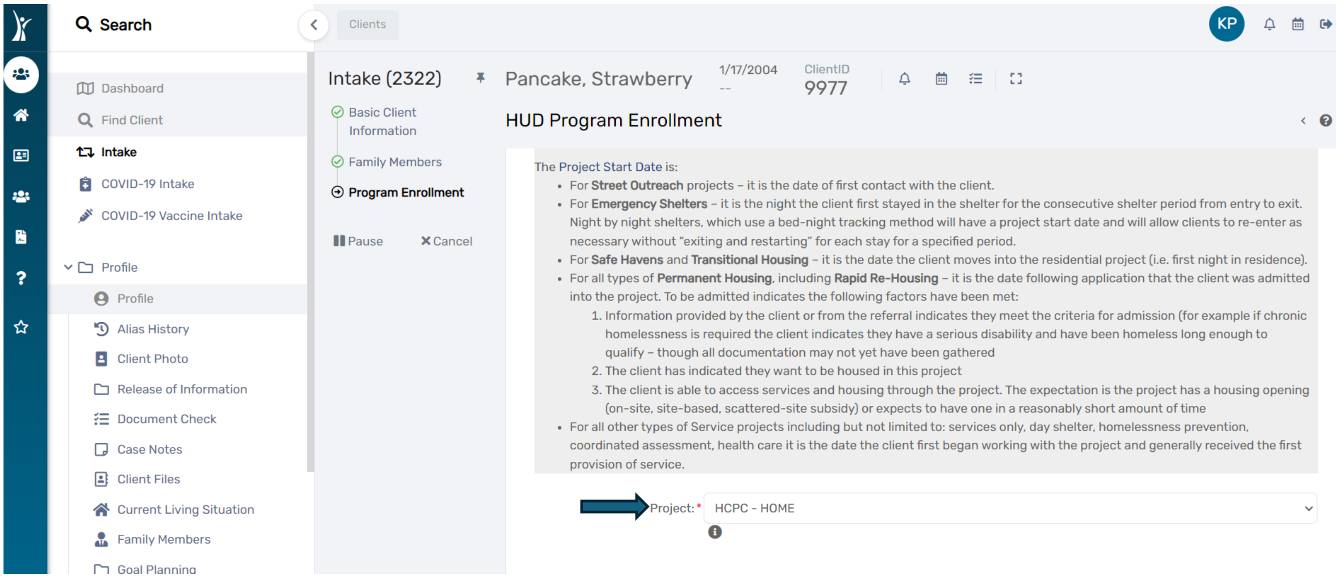


If they are not an exiting client, you will then enter the household members' information section by section. Make sure to completely enter all data fields. This includes **Frist name, Last name, Name Quality, Date of Birth, Birth Date Quality, Gender, SSN, Relationship to Head of Household, Veteran 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.

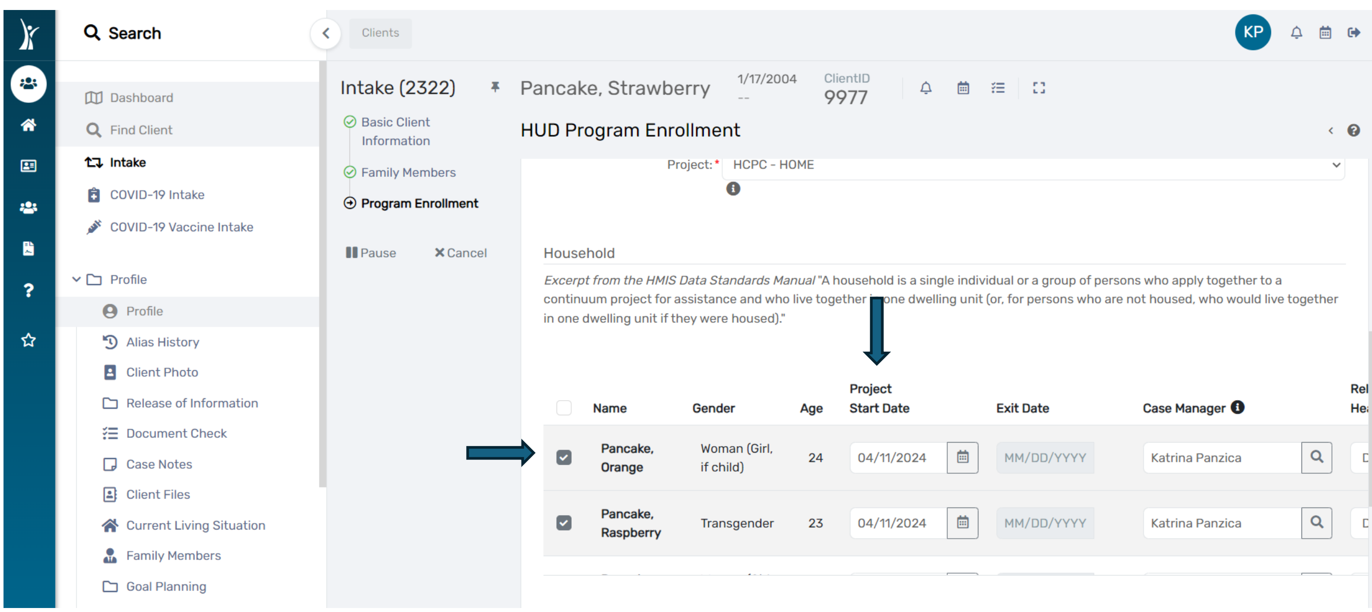


Enrollment Entry for ClientTrack (Existing Clients)

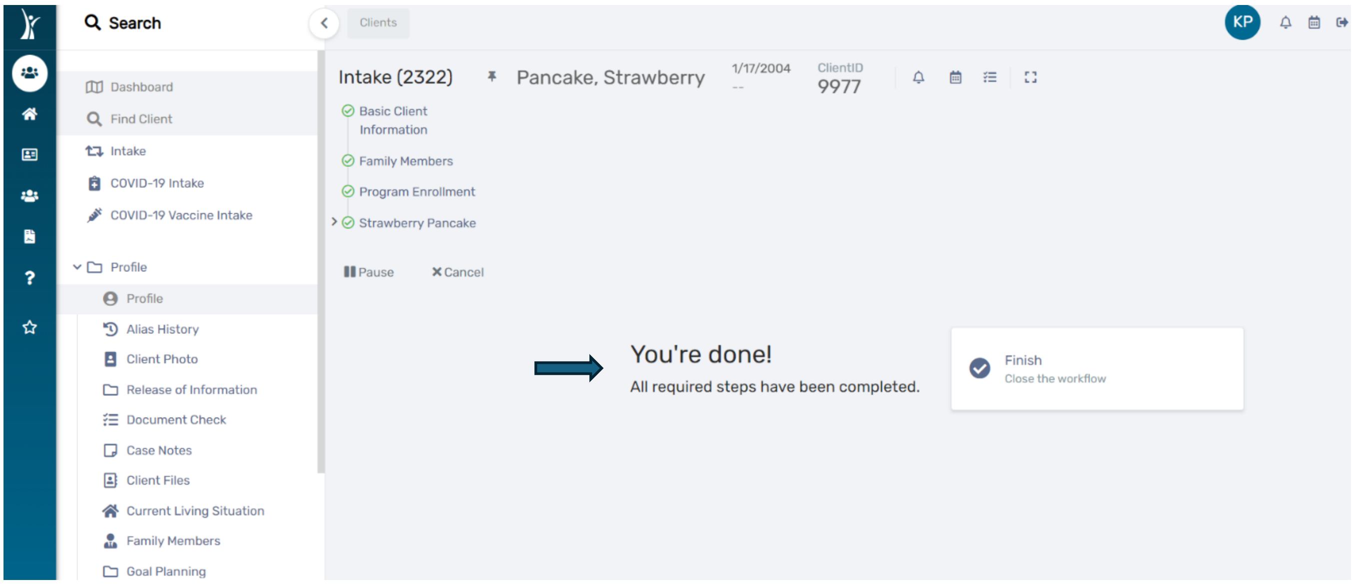
You will be taken to the HUD Program Enrollment page where you will select the specific program the client is being enrolled into. *Only your organization's projects will populate.*



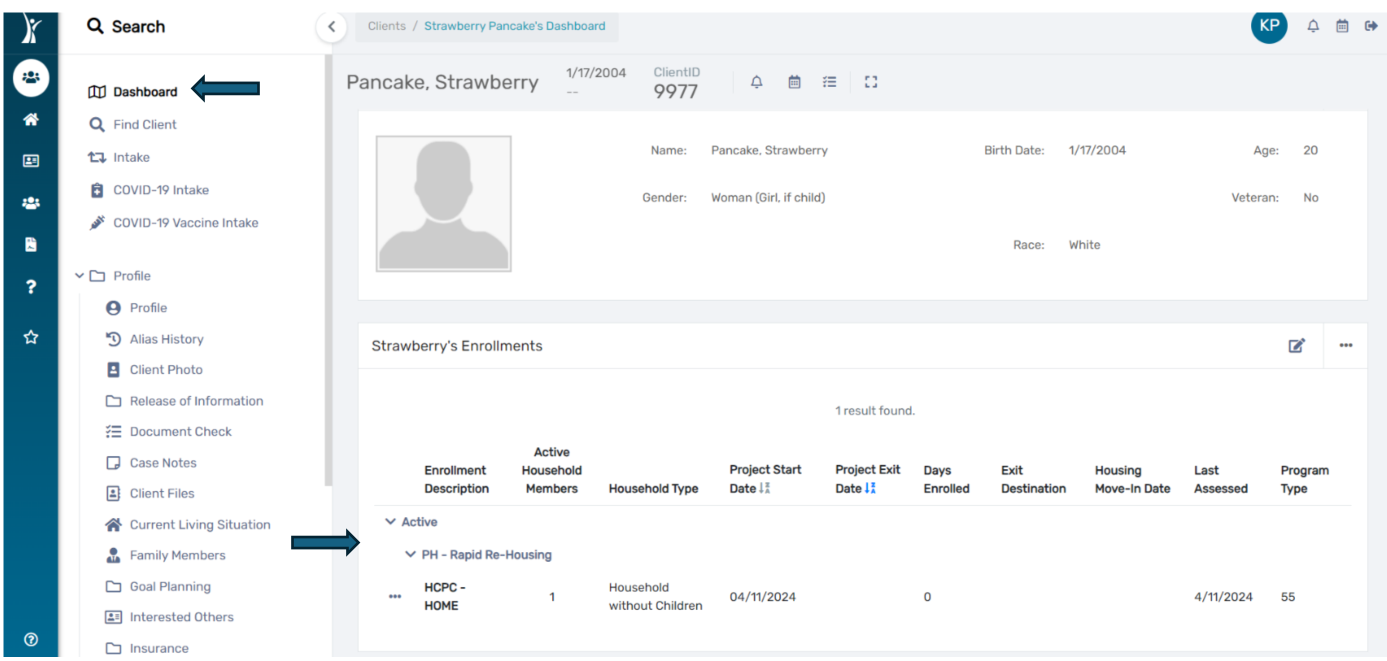
Next, scroll down to "Household" you will check mark the head of household and all household members that are being enrolled into this program. If you need to backdate the enrollment, please make sure to backdate on this page under "Project Start Date" or you will need to change every day moving forward.



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 sates "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".



Enrollment Entry for ClientTrack (Existing Clients)