HMIS BASIC USER MANUAL

Changing Homelessness, Inc.

DECEMBER 16, 2024

CHANGING HOMELESSNESS, INC.

Table of Contents

CHAPTER 3 : HOME WORKSPACE: MENU OPTIONS, FOLDERS, AND SUBFOLDERS 47

CHAPTER 4 : CLIENT WORKSPACE: MENU OPTIONS, FOLDERS, AND SUBFOLDERS 98

Introduction

Online Resources

A general overview of Changing Homelessness and its management of ClientTrack's HMIS for the FL-510 region is at

www.changinghomelessness.org/hmis/

A list of updated FL-510 resources can be found online under Changing Homelessness's NE FL CoC at

https://www.changinghomelessness.org/coc-resources-2/

HUD Exchange's FY 2024 HMIS Data Standards can be found at

https://www.hudexchange.info/programs/hmis/hmis-data-standards/

This ClientTrack HMIS User Guide corresponds with Changing Homelessness's Learning Management Software (LMS) hosted on Moodle at chiedconnect.net. It is strongly encouraged for any user referencing this document to sign up on chiedconnect.net and register for the "How To" tutorial course. To have a profile created or for any ClientTrack related question, send an email to hmis@changinghomelessness.org. Please note, it can take 1-3 business days for an account to be created. You will receive an email confirmation as well as instructions and videos on how to log in and navigate the LMS platform.

Below is a QR code (quick response code). The example below will lead you to the chiedconnect.net website. To utilize the QR code, use your phone camera and scan the code. If you don't have a camera, below the QR code will be a label and a link corresponding with the QR code.

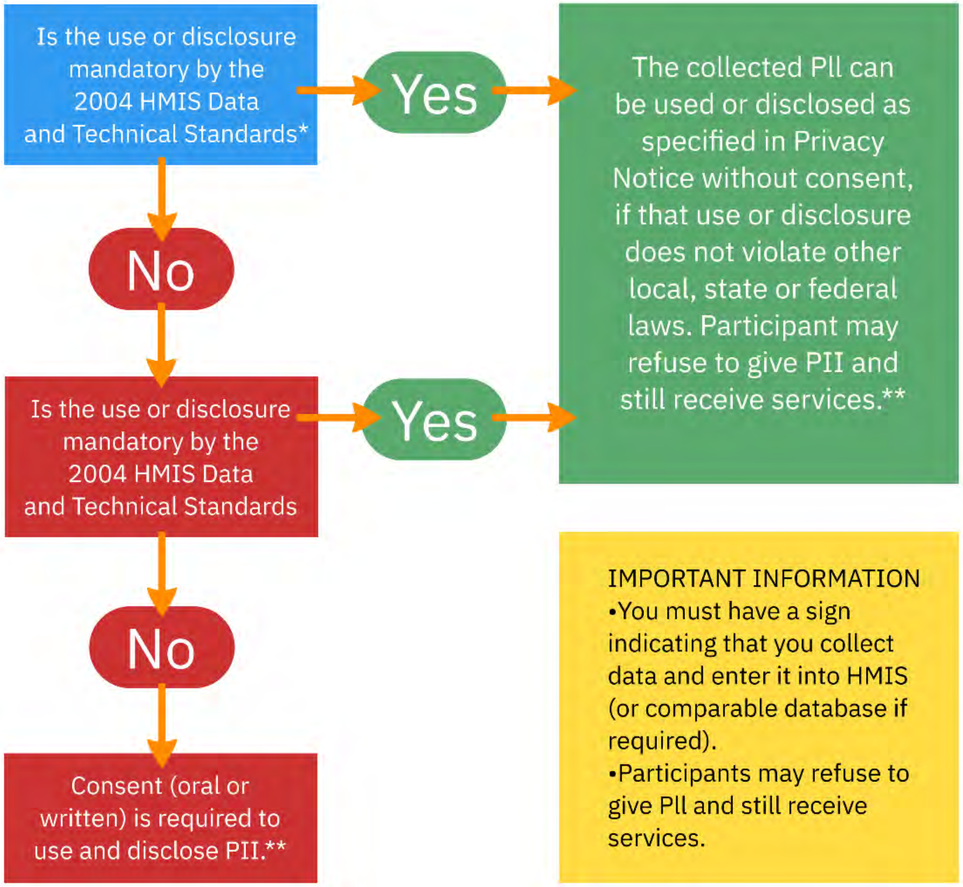
How-To Tutorials

Need more help? Scan the QR code to visit: chiedconnect.net

QR 1 - chiedconnect.net

Client Rights and Responsibilities

Do I need the client's consent (written or oral) to use or disclose information?



Is the use or disclosure mandatory by the 2004 HMIS Data and Technical Standards*

Yes

No

Is the use or disclosure mandatory by the 2004 HMIS Data and Technical Standards

Yes

No

Consent (oral or written) is required to use and disclose PII.**

The collected PII can be used or disclosed as specified in Privacy Notice without consent, if that use or disclosure does not violate other local, state or federal laws. Participant may refuse to give PII and still receive services.**

IMPORTANT INFORMATION
•You must have a sign indicating that you collect data and enter it into HMIS (or comparable database if required).
•Participants may refuse to give PII and still receive services.

TYPES OF USES AND DISCLOSURES

Mandatory:

- Client access to their information; and
- Disclosures for oversight of compliance with HMIS privacy and security standards.

Permitted:

- To provide or coordinate services to an individual;
- For functions related to payment or reimbursement for services;
- To carry out administrative functions, including but not limited to legal, audit, personnel, oversight and management functions; and
- For creating de-identified from PII.

Additional permissions:

- Uses and disclosures required by law;
- Uses and disclosures to avert a serious threat to health or safety;
- Uses and disclosures about victims of abuse, neglect or domestic violence;
- Uses and disclosures for research purposes; and
- Uses and disclosures for law enforcement purposes.

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

*** Best practice is to provide a copy of the Privacy Notice and verbally explain it in plain language to all participants*

Chapter 1 : Introduction

Two Environments: Training and Live

Our HMIS has two separate environments/databases that are used for different purposes. The "Training Environment" is used for practice and training only. The "Production (Live) Environment" is the actual HMIS and all data captured in this environment is what is pulled for reporting and analyzation.

The Training environment can be found here: https://www.clienttrack.net/eshc_train. All users are activated here first, before they are given access to the live environment. You may use it at any time and may enter any data for testing and practice purposes. ***No live data should be*** added to the Training Environment and periodically, the data may be wiped from the Training Environment to ensure this remains the case.

The Production, or Live, environment can be found here: https://clienttrack.eccovia.com/login/ESHC. All users must complete New User Training to have their live account activated. All data collected here must be treated as confidential and with the utmost privacy. The data stored in the Production (Live) environment is the data used for grant reporting, etc. so Users should be as accurate as possible when inputting any data or taking any actions that may influence data integrity.

Changing Homelessness HMIS administration maintains the practice of making your username the same as your given work email in your New User form (filled out by your agency and returned to us before you are entered into our system).

Key terminology and Navigation

Icons and Buttons

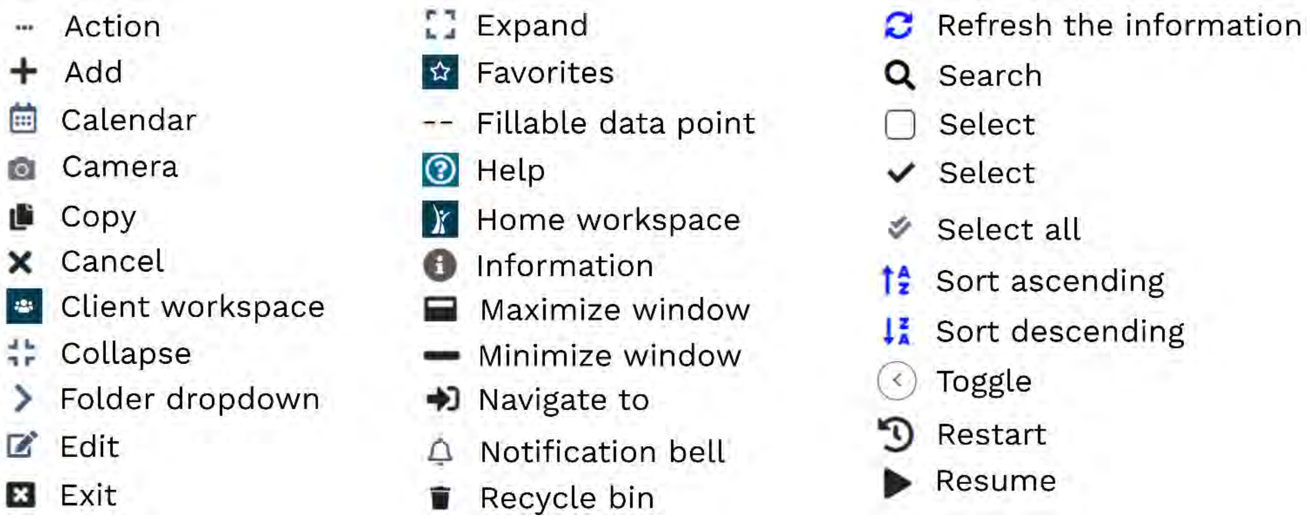


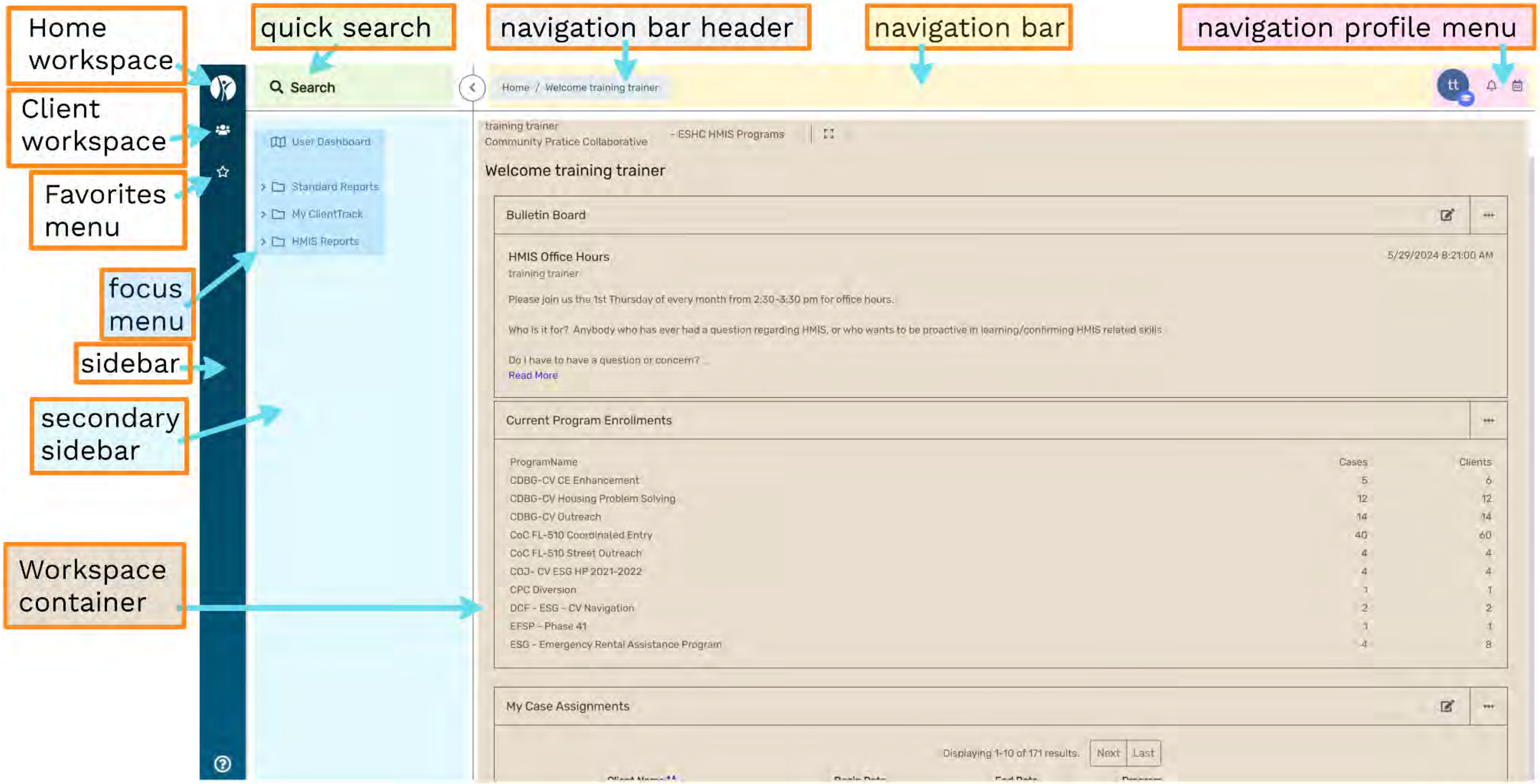
Figure 1-1 – Icons and Buttons

General Navigation

This section will go over basic general navigation of the ClientTrack HMIS system.

General Page Anatomy, Functions, and Page Terminology

Basic ClientTrack Page Anatomy



training trainer
Community Pratice Collaborative

- ESHC HMIS Programs

Welcome training trainer

Bulletin Board

HMIS Office Hours
training trainer

5/29/2024 8:21:00 AM

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...

Read More

Current Program Enrollments

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	40	60
CoC FL-510 Street Outreach	4	4
COJ- CV ESG HP 2021-2022	4	4
CPC Diversion	1	1
DCF - ESG - CV Navigation	2	2
EFSP - Phase 41	1	1
ESG - Emergency Rental Assistance Program	4	8

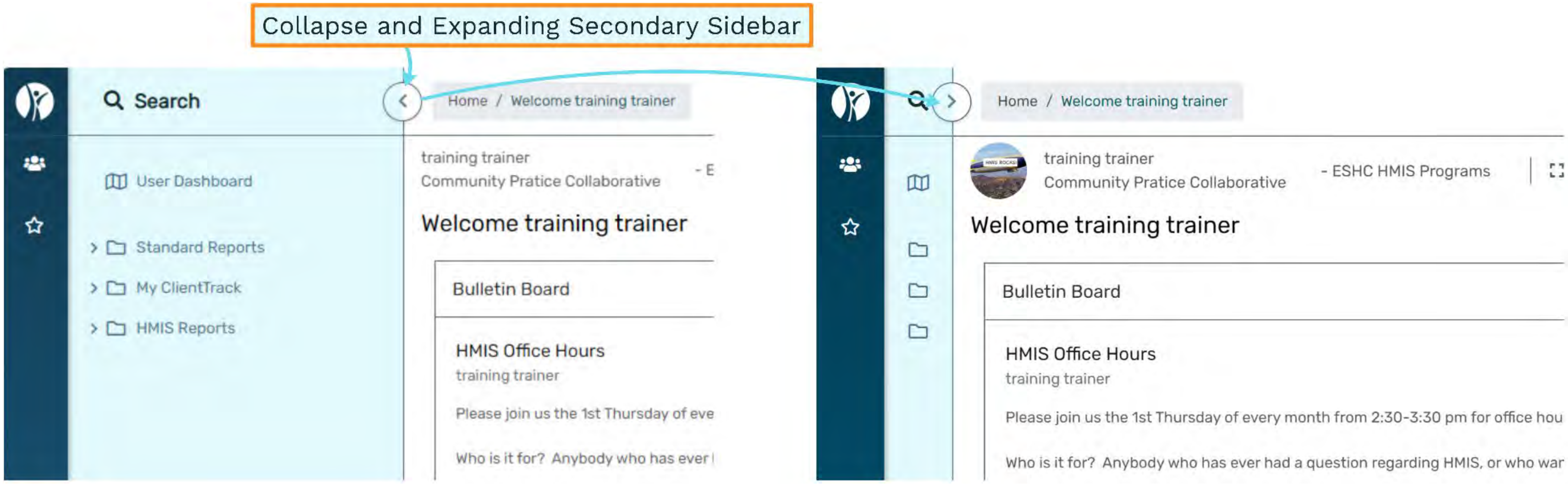
My Case Assignments

Displaying 1-10 of 171 results.

Figure 1-2- Basic ClientTrack Page Anatomy

Collapsing and Expanding Secondar Sidebar

The secondary sidebar can be expanded or collapsed by clicking on the left/right arrow.



Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hou

Who is it for? Anybody who has ever had a question regarding HMIS, or who war

Figure 1-3- Collapsing and Expanding Secondary Sidebar

Expanding Dropdown Folders

Folders and subfolders can be expanded and collapsed by clicking on a dropdown arrow or text horizontal to a dropdown arrow.

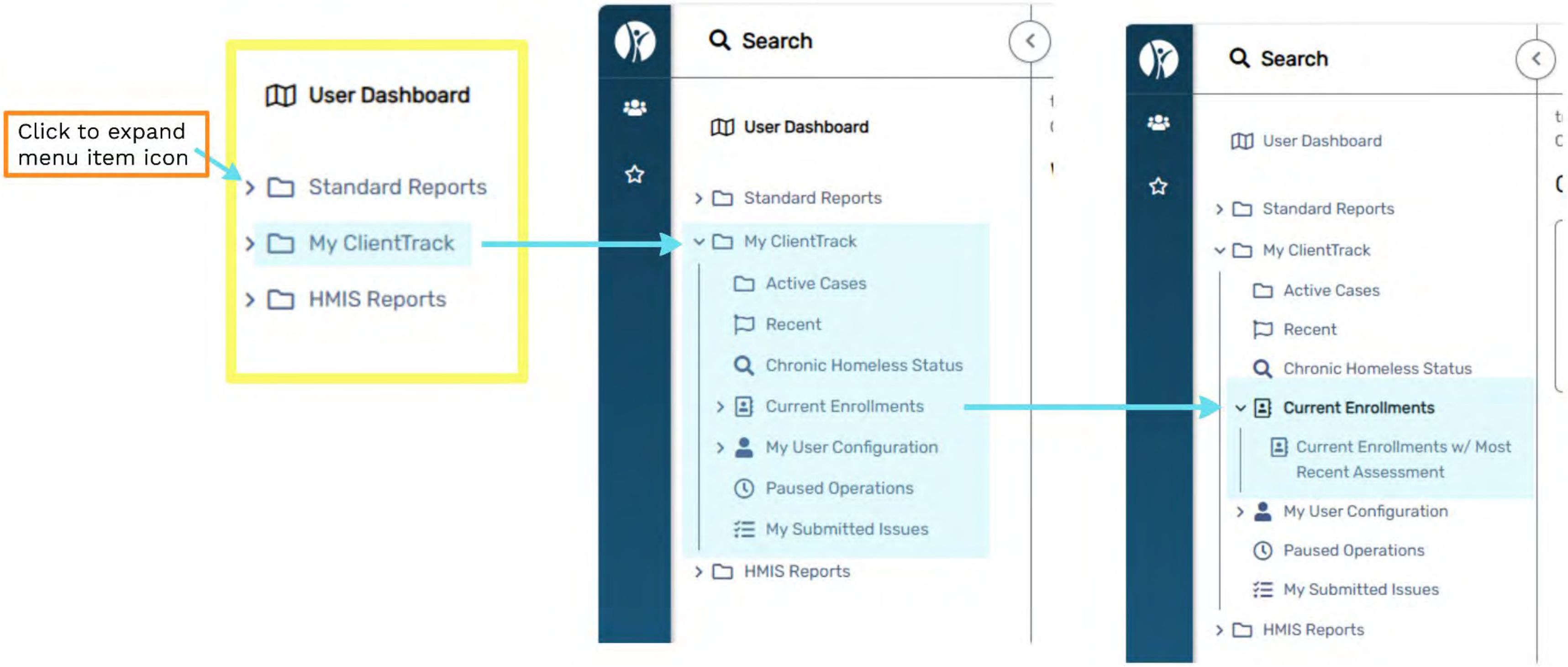
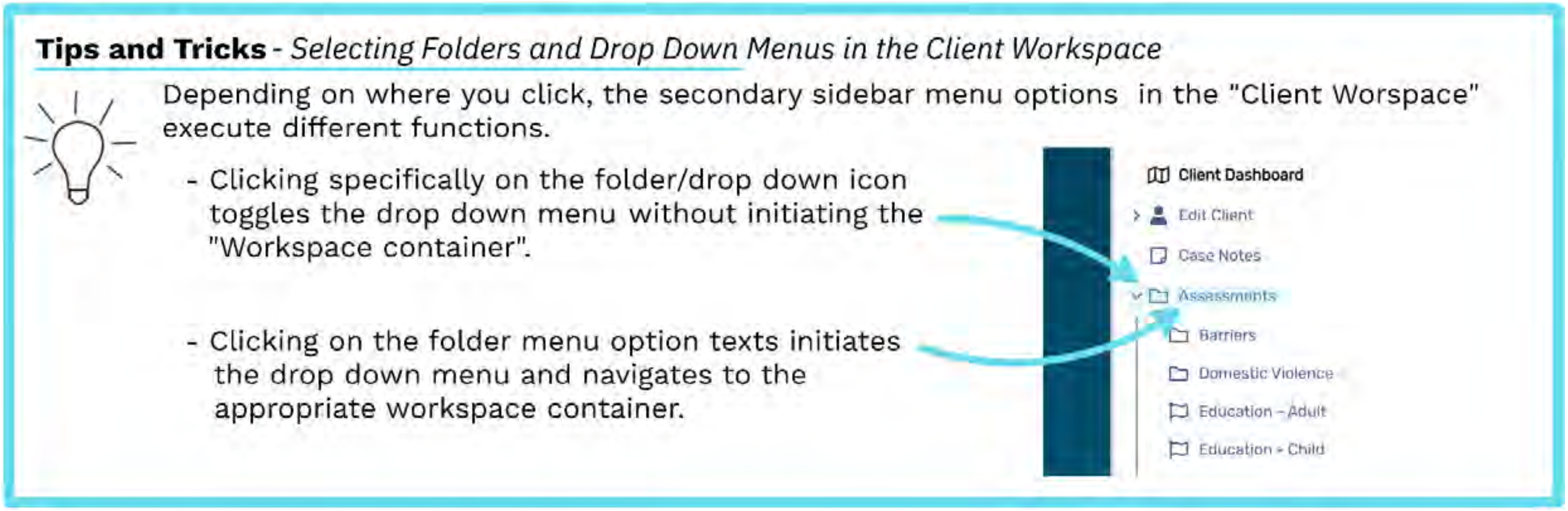

Click to expand menu item icon

Figure 1-4 – Expanding Dropdown Folders



Tips and Tricks - *Selecting Folders and Drop Down Menus in the Client Workspace*

Depending on where you click, the secondary sidebar menu options in the "Client Worspace" execute different functions.

- Clicking specifically on the folder/drop down icon toggles the drop down menu without initiating the "Workspace container".
- Clicking on the folder menu option texts initiates the drop down menu and navigates to the appropriate workspace container.

Figure 1-5 – Tips and Tricks – Selecting Folders and Dropdown Menus

Home Workspace Entity Bar and Content Header

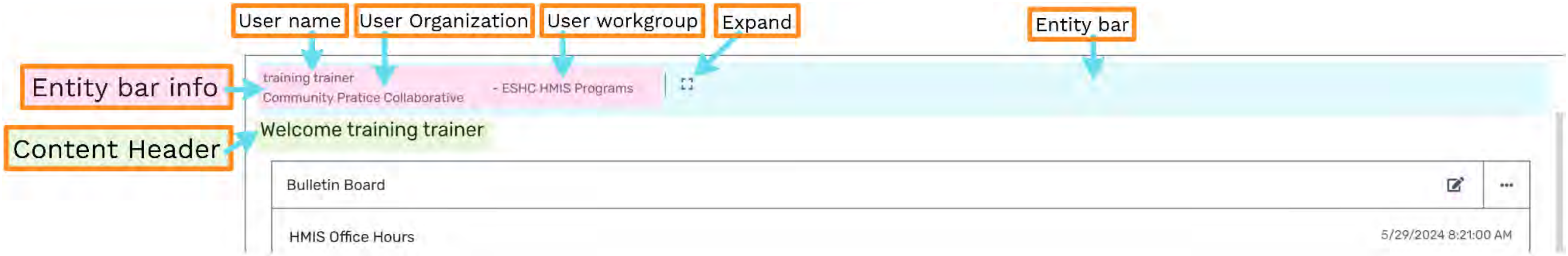


Figure 1-6 – Home Workspace Entity Bar and Content Header

Client Workspace Entity Bar and Content Header

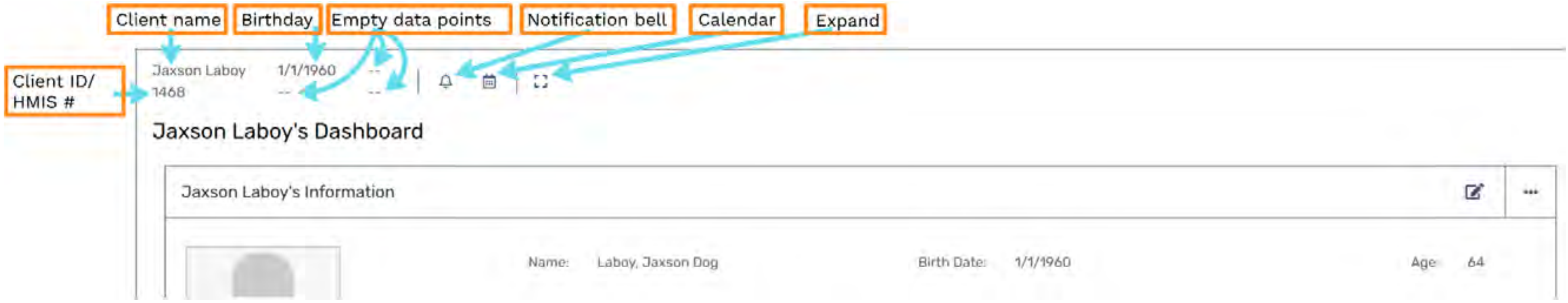


Figure 1-7 – Client Workspace Entity Bar and Content Header

HMIS Training Procedures

To gain access to the Production/Live environment, an individual must:

- Agree to and complete the HMIS New User Agreement
- Successfully complete the HMIS New User Training

HMIS Trainings: Basic Training Information

HMIS New User Training Information: The HMIS Systems Team at Changing Homelessness has several "HMIS New User Training" methods to accommodate organizations and individuals' needs and preferences. Standard training practice included completing an online New User course found at https://chiedconnect.net/. Please contact us at hmis@changinghomelessness.org to register for a training or if you have any additional questions.

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

HMIS Report Training Information: The HMIS Systems Team at Changing Homelessness holds "HMIS Report Trainings" by user/group request. "HMIS Report Trainings" are also available online at chiedconnect.net. This training is aimed at providing users the opportunity to learn more advanced tools in ClientTrack, especially around reporting, data clean-up for reporting, and pulling data on their own. Please contact us at hmis@changinghomelessness.org to register for a training or if you have any additional questions.

Training Processes and Procedures

Once a new user training is requested, new users will receive an email and complete a new user agreement form by filling out an HMIS User Agreement by going to https://www.changinghomelessness.org/hmis-user-agreement/

There are two main types of New User Trainings. However, if you have any questions or concerns, or need specific accommodations such as, but not limited to, live – online training, or live – in-person group or individual training, please contact Changing Homelessness's HMIS team at hmis@changinghomelessness.org and an instructor will reach out to communicate preferences and discuss available options.

New User Training types are chosen by availability, user preference, and other factors. The two main types of New User trainings are:

A. HMIS New User Training - Online

B. HMIS New User Training - Hybrid

HMIS New User Training - Online

The steps to completing the HMIS New User Training – Online are as follows:

1. User or Supervisor initiates contact with HMIS team by sending an email to hmis@changinghomelessness.org
2. User receives a reply email from hmis@changinghomelessness.org with a link and instructions to fill out an HMIS User Agreements. User fills out HMIS User agreement.
3. After receiving HMIS User agreements submission, HMIS team member emails user a welcome email with instructions on how to start the appropriate New User training course.
4. User completes course, and per the instructions of the course, sends an email to hmis@changinghomelessness.org to communicate course completion.
5. HMIS team checks course submissions.
    a. If the course is completed fully, login instructions to log into the "live" environment are sent to new user.
    b. If the course is not completed, HMIS team emails new user applicable correction/submission requirements to user. Once the user corrects and communicates the completion of corrections, "live" environment login instructions are sent to new user.
6. HMIS team reaches out to new user after two weeks requesting any feedback/follow up questions the new user may have encountered.

HMIS New User Training – Hybrid

The steps to completing the HMIS New User Training – Hybrid are as follows:

1. User initiates contact with HMIS team by sending an email to hmis@changinghomelessness.org
2. User fills out HMIS User agreement.
3. After receiving HMIS User agreements submission, HMIS team member emails user a welcome email requesting 3 available times in the time slots of Tuesday-Thursday at either 10:30am or 1 pm to complete a 1-hour introduction live training before the user begins online training.
4. HMIS team member receives available times and sends invite to new for live training.
5. Live training is completed with HMIS team member and new user.
6. After completing live training, HMIS team member emails users a welcome email with instructions on how to start the appropriate Hybrid New User training course online.
7. User completes course, and per the instructions of the course, sends an email to hmis@changinghomelessness.org to communicate course completion.
8. HMIS team checks course submissions.
    a. If the course is completed fully, login instructions to log into the "live" environment are sent to new user.
    b. If the course is not completed, HMIS team emails new user applicable corrections/submission requirements to user. Once the user corrects and communicates the completion of corrections, "live" environment login instructions are sent to new user.
9. Two weeks after completing training, HMIS team reaches out to new user requesting any feedback/follow up questions the new user may have encountered.

HMIS Troubleshooting and Issue Reporting

Reporting Issues

The most common way to get help with ClientTrack is to contact the HMIS Systems Team at hmis@changinghomelessness.org. However, submitting an issue via ClientTrack's Help Center* is also an option for all users.

*For general information regarding the the Help Center navigate to Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Help Center in the "HMIS Basic User 2025 Manual".

Password Troubleshooting and Resets

For instructions on how to log into ClientTrack for the first time, see Chapter 2: Navigating in ClientTrack/General Navigation/How to Log in to ClientTrack

Passwords must be reset every 90 days. Users will be prompted at the login screen to update/change passwords before they expire. Users must create at least 6 consecutive unique passwords before reusing a previous password.

Users who have not logged into the ClientTrack system for 8 or more days automatically will have accounts locked by default. To have an account unlocked, send a request to hmis@changinghomelessness.org.

For password resets or login questions, please send all requests to the main HMIS email: hmis@changinghomelessness.org

Chapter 2 : Navigating in ClientTrack

The sections that follow covers basic navigation through ClientTrack and the multiple functions it has. Many of the items covered in this section were introduced in the HMIS New User Training.

General Navigation

How to Log in to ClientTrack

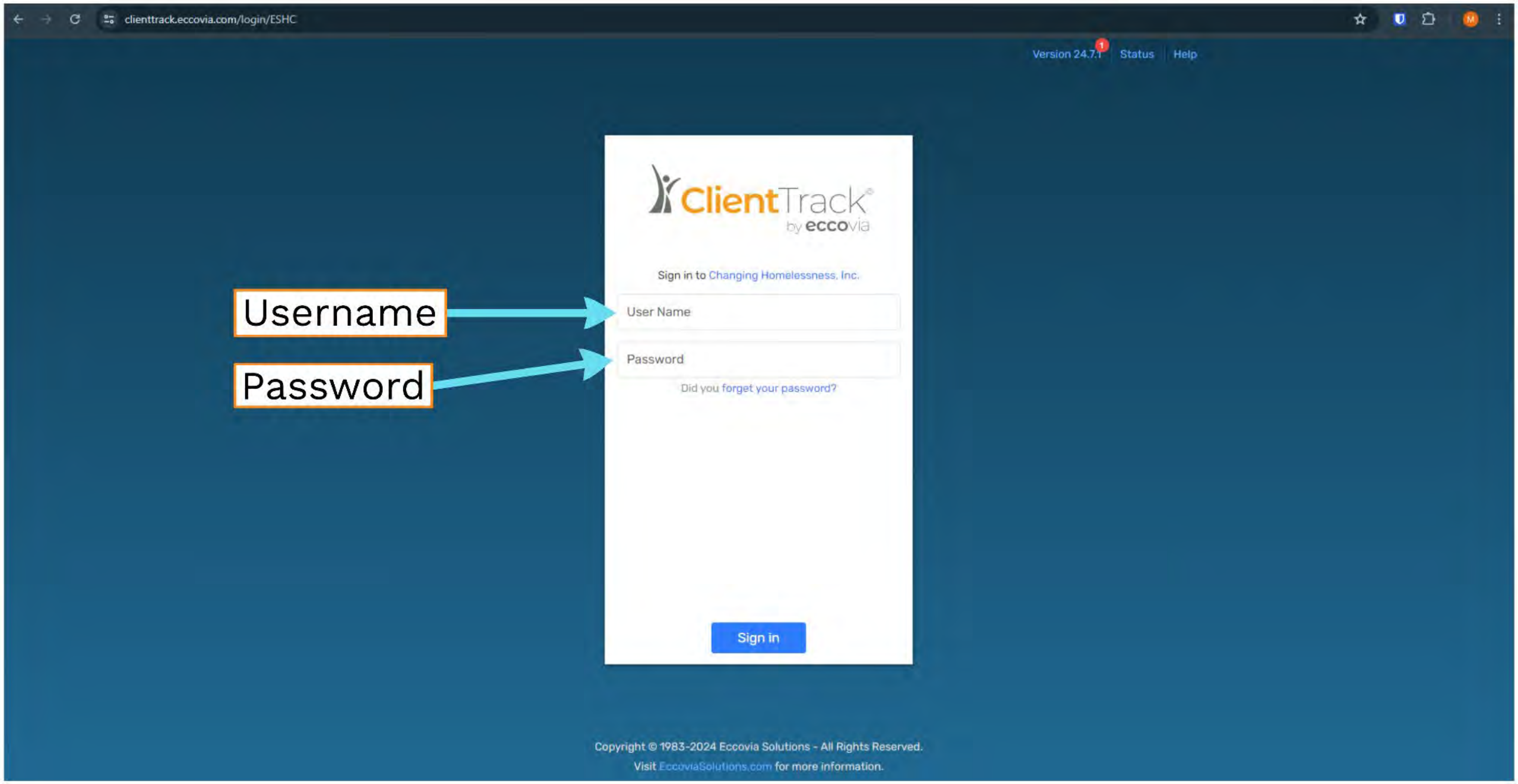
Steps to Logging into ClientTrack

Step 1: Navigate to the Client Track environment you wish to sign into:

- **LIVE:** https://www.clienttrack.net/eshc
- **TRAINING:** https://www.clienttrack.net/eshc_train

Step 2: Enter your username. It is standard that a username is the email submitted with the HMIS User Agreement. It is standard for the submitted HMIS User Agreement email to be an official organization's e-mail domain. Enter your password and click "Sign In".

For password troubleshooting, navigate to Chapter 1: HMIS ClientTrack Basics/General Navigation/Password Troubleshooting and Resets in the "HMIS Basic User 2025 Manual".



Sign in to Changing Homelessness, Inc.

Did you forget your password?

Copyright © 1983-2024 Eccovia Solutions - All Rights Reserved.
Visit EccoviaSolutions.com for more information.

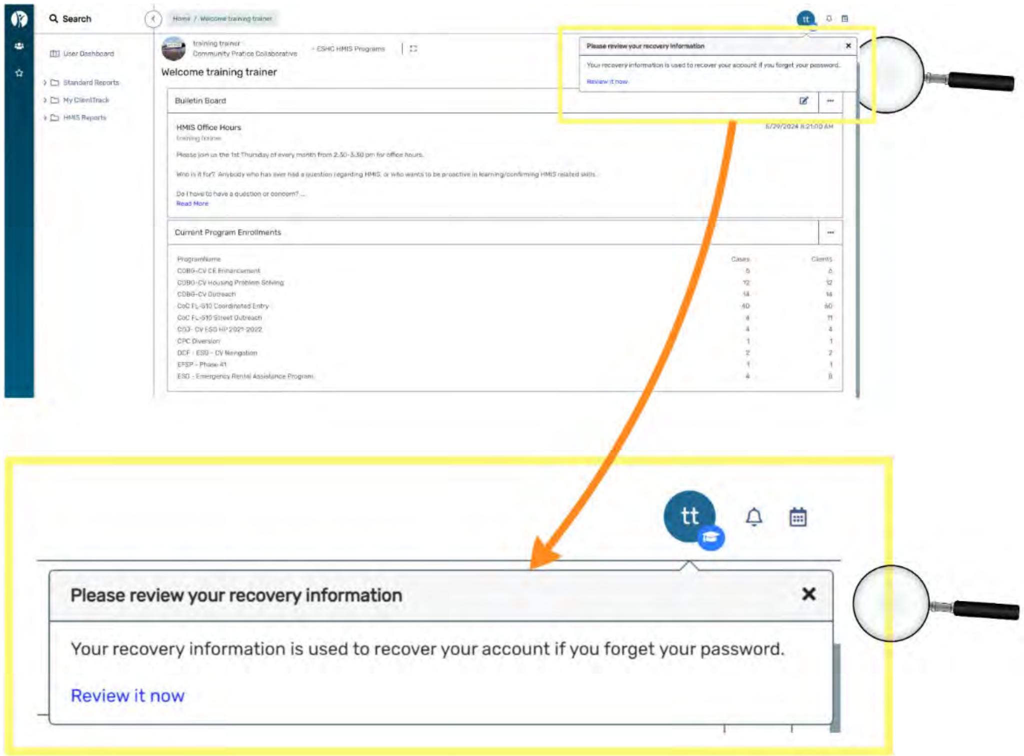
Figure 2-1 – Logging into ClientTrack

Setting Recovery Information

For existing users, navigate in the “HMIS Basic User 2025 Manual” to Chapter 3: Home Workspace: Menu Options, Folders, and Subfolders/My User Configuration: Subfolder**/**My User Configuration- Change My Password: Subfolder, or Chapter 2: Navigation in ClientTrack/General Navigation/User Profile Settings Menu and select “Security Settings”.

Steps to Complete New User Recovery Information Pop-up Window

Step 1: For new Users logging in for the first time**,** a pop-up window will be visible on the top right portion of the screen. To complete the recovery Information prompt – Click “Review it now”. Please note that until the recovery information is completed, the pop-up will continue each time a user logs in to ClientTrack.



Please review your recovery information

Your recovery information is used to recover your account if you forget your password.

Review it now

Figure 2-2 – Setting Recovery Information

Step 2: Type in current password

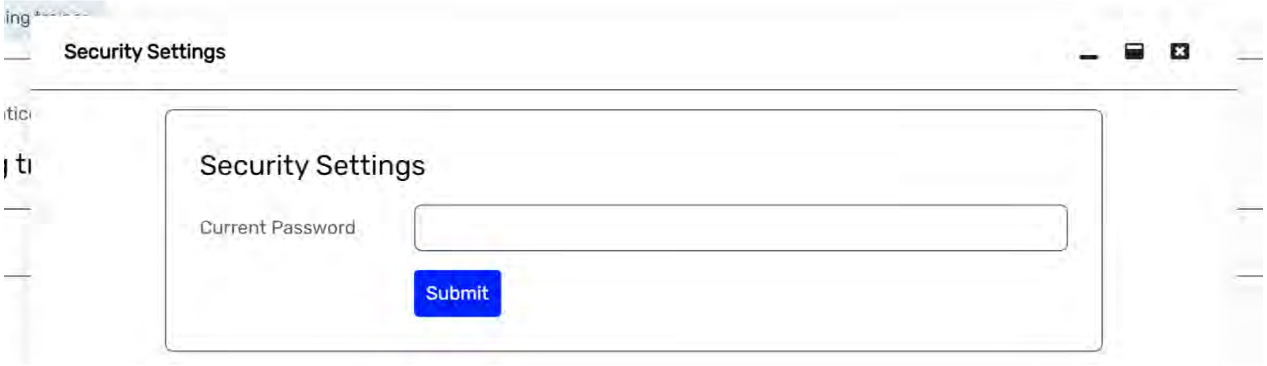
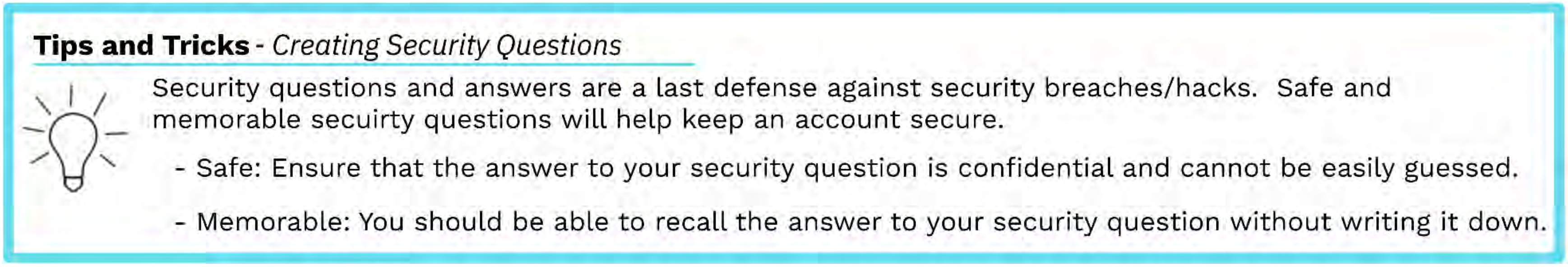


Figure 2-3 – Security Settings

Step 3: Set a recovery question and answer and click, “Update”.

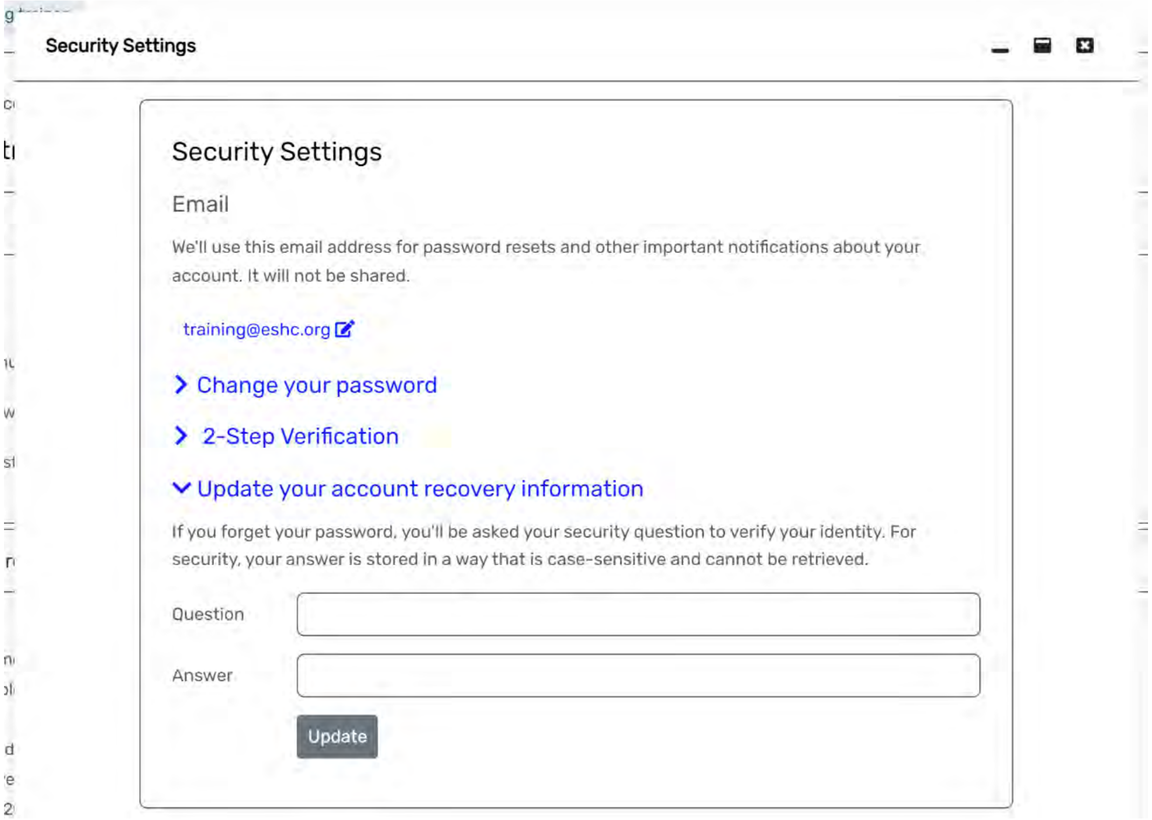


Tips and Tricks - *Creating Security Questions*

Security questions and answers are a last defense against security breaches/hacks. Safe and memorable secuirty questions will help keep an account secure.

- Safe: Ensure that the answer to your security question is confidential and cannot be easily guessed.
- Memorable: You should be able to recall the answer to your security question without writing it down.

Figure 2-4 – Tips and Tricks – Creating Security Questions



Security Settings

Email

We'll use this email address for password resets and other important notifications about your account. It will not be shared.

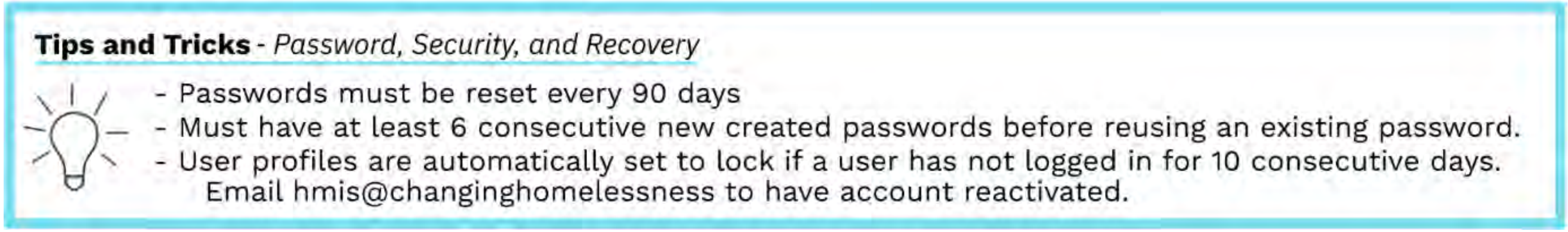
training@eshc.org

If you forget your password, you'll be asked your security question to verify your identity. For security, your answer is stored in a way that is case-sensitive and cannot be retrieved.

Question

Answer

Figure 2-5 – Security Settings Pop-out Window



Tips and Tricks - *Password, Security, and Recovery*

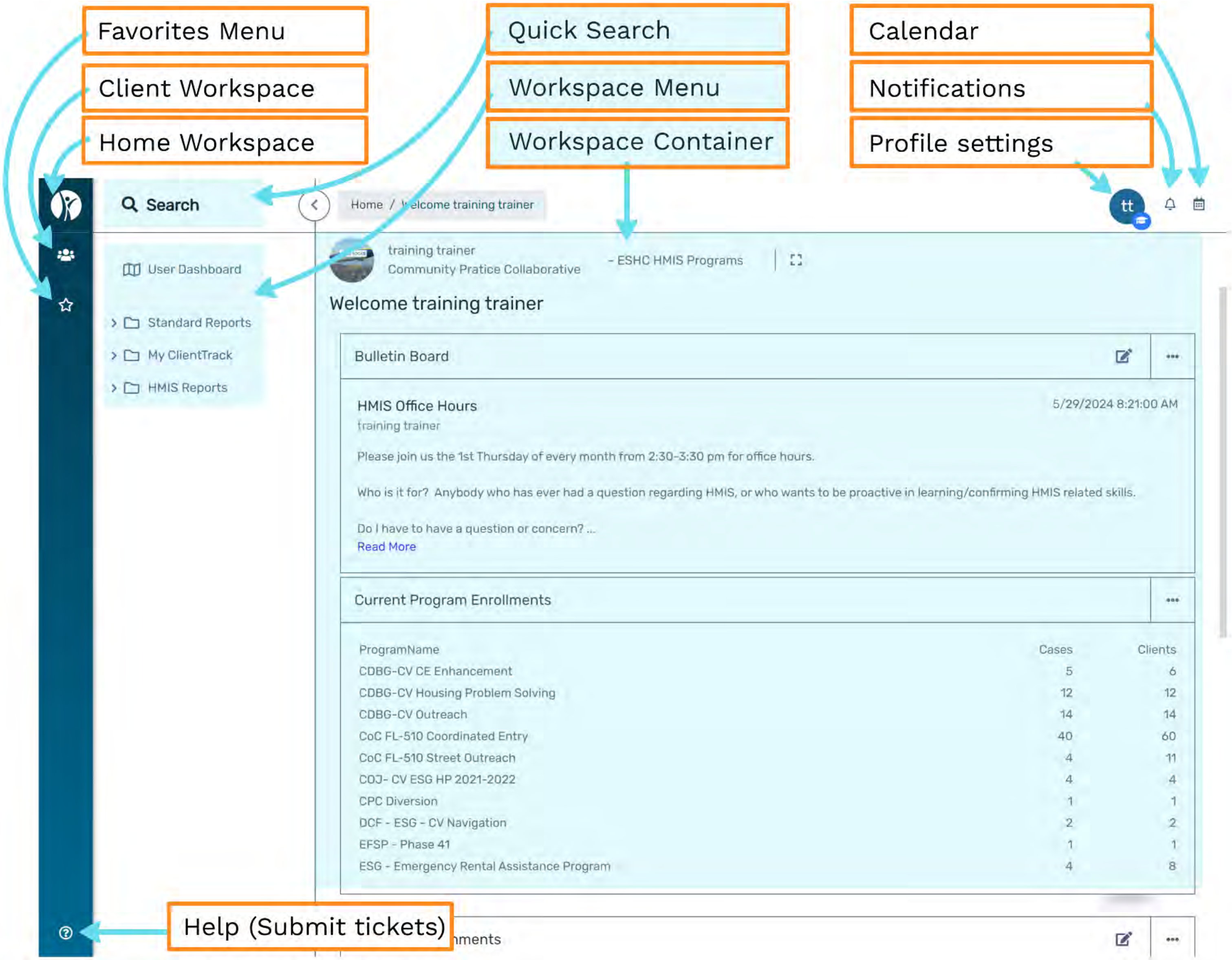
- Passwords must be reset every 90 days
- Must have at least 6 consecutive new created passwords before reusing an existing password.
- User profiles are automatically set to lock if a user has not logged in for 10 consecutive days. Email hmis@changinghomelessness to have account reactivated.

Figure 2-6 – Tips and Tricks – Password, Security, and Recovery

General Workspace Screen Anatomy

The “Home”* and “Client”* “Workspace” landing screen include the default items that is displayed when navigating across workspaces.

**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”.*



Welcome training trainer

HMIS Office Hours

training trainer

5/29/2024 8:21:00 AM

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...

Read More

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	40	60
CoC FL-510 Street Outreach	4	11
COJ- CV ESG HP 2021-2022	4	4
CPC Diversion	1	1
DCF - ESG - CV Navigation	2	2
EFSP - Phase 41	1	1
ESG - Emergency Rental Assistance Program	4	8

Figure 2-7 – Home Screen Basic Anatomy

The “Home Workspace” screen has the following sections:

- Profile Settings
- Notifications
- Calendar
- Workspace screen
- Quick Search
- Workspace Menu
- Home Workspace
- Client Workspace
- Favorites Menu
- Help and support icon

User Profile Settings Menu

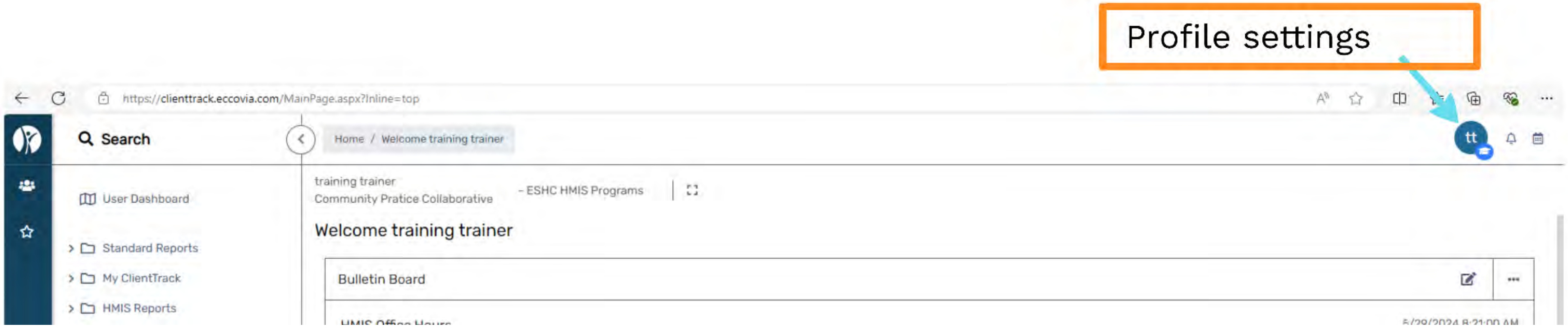


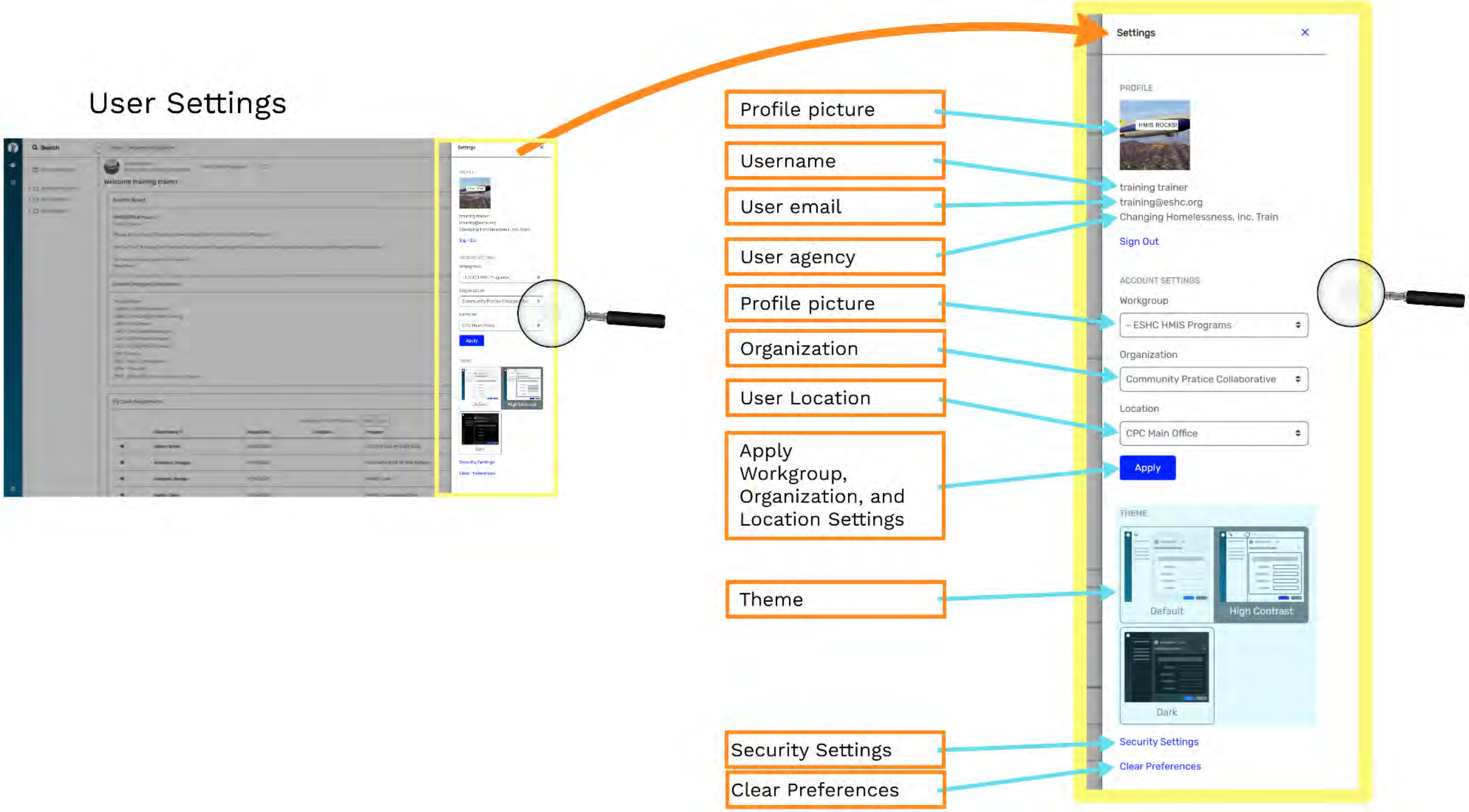
Figure 2-8 – Profile Settings Button Navigation

The following settings should already be entered by default. However, verify that these are the settings you are signing in with as a precaution.

Workgroup - ESHC HMIS Programs

Organization – **Your Organization*

Location – **Preset Location*



training trainer
training@eshc.org
Changing Homelessness, Inc. Train

Workgroup: – ESHC HMIS Programs

Organization: Community Pratice Collaborative

Location: CPC Main Office

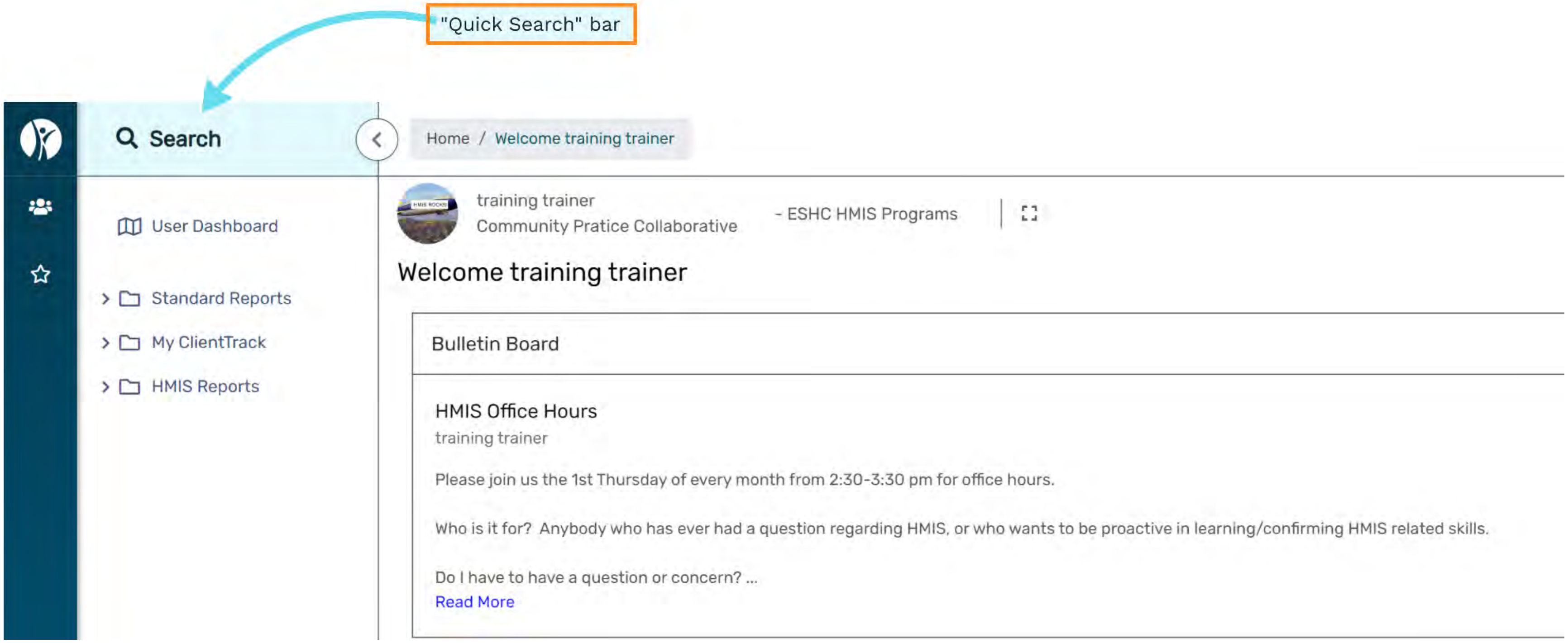
Figure 2-9 – Prolife Settings Pop Out Anatomy

Quick Search

“Quick Search” is a dynamic search tool that can help navigate in ClientTrack.

“Quick Search” is located permanently at the top of the secondary sidebar*.

**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”.*



HMIS Office Hours

training trainer

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...

Read More

Figure 2-10 – Quick Search

Utilizing and executing a search with "Quick Search"

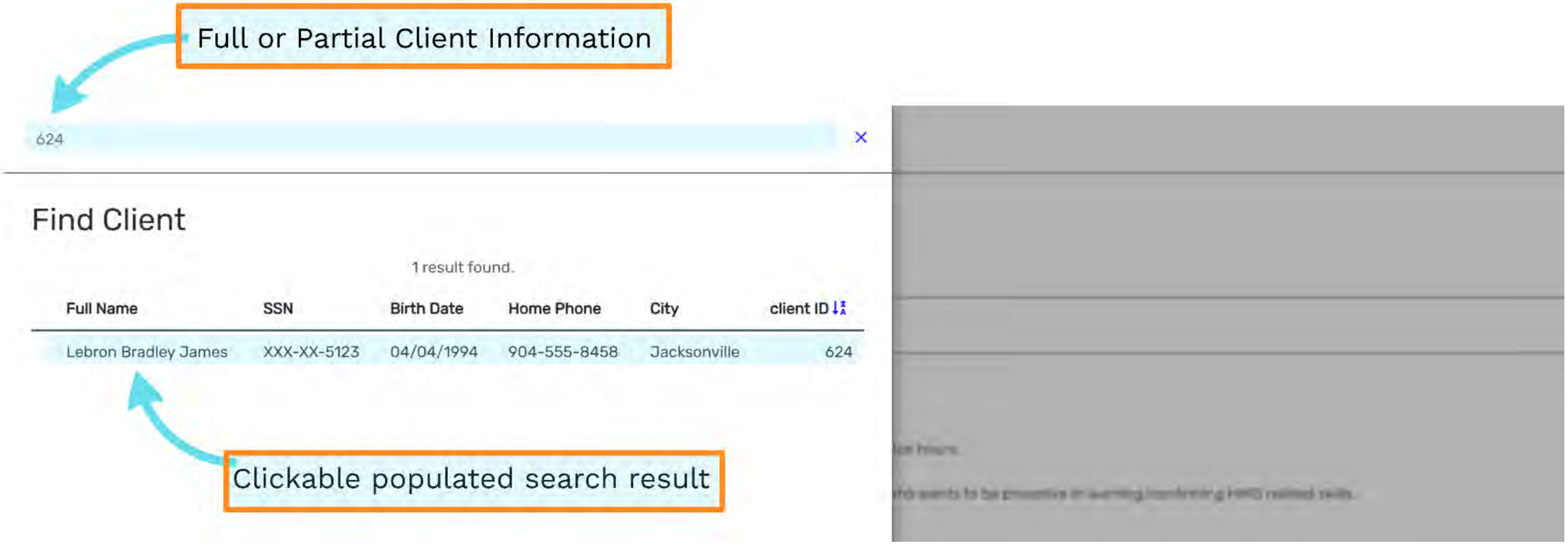
Step 1: To utilize "Quick Search", click within the box. A call-out window will appear with the past 10 executed searches for Client #s and the 5 most recently accessed client profile names.

Recent Searches
1535
1533
1532
1521
1530
1531
1529
1524
1525
1523

Recent Clients
Shorter, Sally
James, Lebron Bradley
Dickinson, Joe
Mathis, Joe Sam
YOUNG, D'ARCY

Figure 2-11 – Quick Search Call-out Window

Step 2: Type in search criteria. ClientTrack will automatically populate results after the first unit is entered.



Full or Partial Client Information

624

Find Client

1 result found.

Full Name	SSN	Birth Date	Home Phone	City	client ID
Lebron Bradley James	XXX-XX-5123	04/04/1994	904-555-8458	Jacksonville	624

Clickable populated search result

Figure 2-12 – Quick Search Populated List

Step 3: Click applicable choice. ClientTrack will navigate to the selection.

Tips and Tricks - *ClientTrack's Dynamic "Quick Search"*

Quick Search can populate results from client names, client #s, as well as other aspects like ClientTrack folders. Quick Search can also populate results with partial information.

⚠ For searching clients before intakes, it is still best practice to use the "Find Client" folder as that client search is more consistent and customizable.

Partial searches

james

Find Client

Displaying 1-20 of 54 results. Next Last

Full Name	SSN	Birth Date	Home Phone	City	client ID
Jerome Lavette James	XXX-XX-9877	03/11/2018			1481
Malachi James	XXX-XX-4563	01/01/1960			1464
Sheldon James	XXX-XX-4658	08/07/1987	904-555-8543		1239
Sarah James	XXX-XX-5755	06/08/1985			1140
Jimmy James	XXX-XX-5588	05/05/1982	904-555-5555		1139
Sarah James	XXX-XX-8888	08/08/2015			1136
Jimmy James	XXX-XX-5555	05/05/1999	904-999-9999		1135
George James	XXX-XX-8457	04/08/1986			1134
Bobby James	XXX-XX-5544	05/05/1982	904-888-5555		1131
James Jameson	XXX-XX-4888	05/08/1979			1119
Janise LaVette James	XXX-XX-2324	03/11/2020			1109
Rick James	XXX-XX-4748	08/04/1980	904-555-4785		1089
Jerry James	XXX-XX-3333	07/08/1981			1082
Sarah james	XXX-XX-4444	05/05/1982	904-999-9999		1081
Fred Jameson	XXX-XX-7777	05/08/1992			1074
Sally Jameson	XXX-XX-8888	05/08/1993	999-888-8888		1073
Jimmy James		05/05/2019			1067
nella james	XXX-XX-4567	01/23/1973			1056
Sid James	XXX-XX-6787	01/23/1993			1055
Sally Jameson		06/08/1983			1038

lebron ja

Find Client

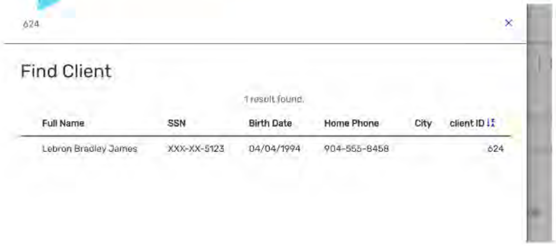
1 result found.

Full Name	SSN	Birth Date	Home Phone	City	client ID
Lebron Bradley James	XXX-XX-5123	04/04/1994	904-555-8458		624

Folder searches

intake

Client # searches



624

Find Client

1 result found.

Full Name	SSN	Birth Date	Home Phone	City	client ID
Lebron Bradley James	XXX-XX-5123	04/04/1994	904-555-8458		624

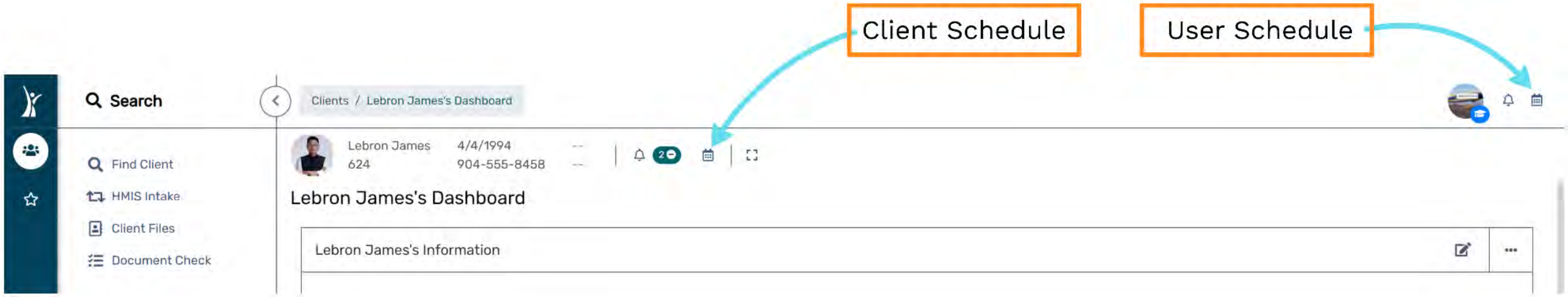
Figure 2-13 – Tips and Tricks – Dynamic Quick Search

User and Client Schedule/Calendar

ClientTrack’s schedule options allow users to create individual schedules for the user or specific clients.

User schedules are always viewable on the “Navigation Profile Menu”*. Client schedules are viewable on a client’s dashboard in the “Entity Bar”.

**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”.*



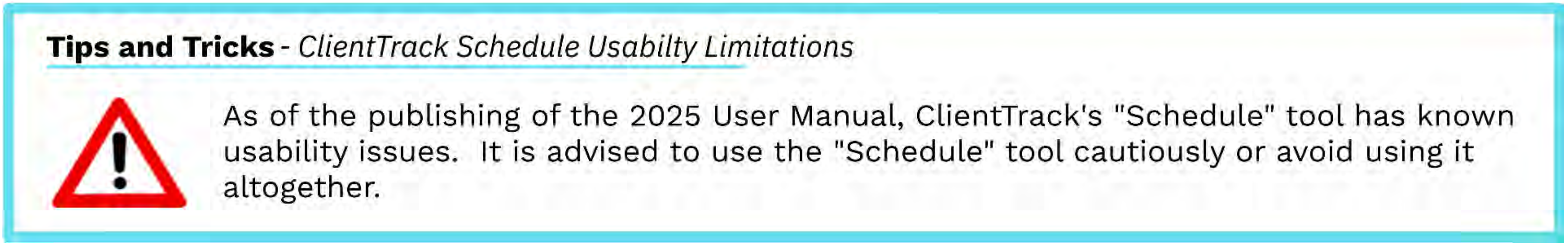
Lebron James 624

4/4/1994 904-555-8458

Lebron James's Dashboard

Lebron James's Information

Figure 2-14 – User and Client Schedules



Tips and Tricks - *ClientTrack Schedule Usabilty Limitations*

As of the publishing of the 2025 User Manual, ClientTrack's "Schedule" tool has known usability issues. It is advised to use the "Schedule" tool cautiously or avoid using it altogether.

Figure 2-15 – Tips and Tricks – ClientTrack Schedule Usability Limitations

(User) Notifications

User Notifications

The (User)* “Notifications” icon** is located on the “Navigation Profile Menu”***.

**For (Client) “Notifications”, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Edit Client: Folder/(Client) Notifications: Subfolder in the “HMIS Basic User 2025 Manual”*

***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 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”.*

Viewing/Editing User Notifications through the Notification Bell Icon

Step 1: Click on the (User) “Notifications” icon* is located on the “Navigation Profile Menu”**.

**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”.*

***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”.*

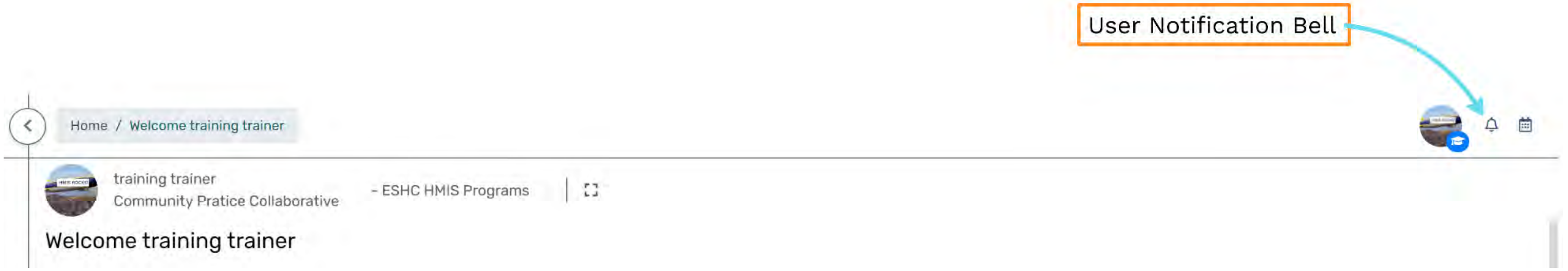
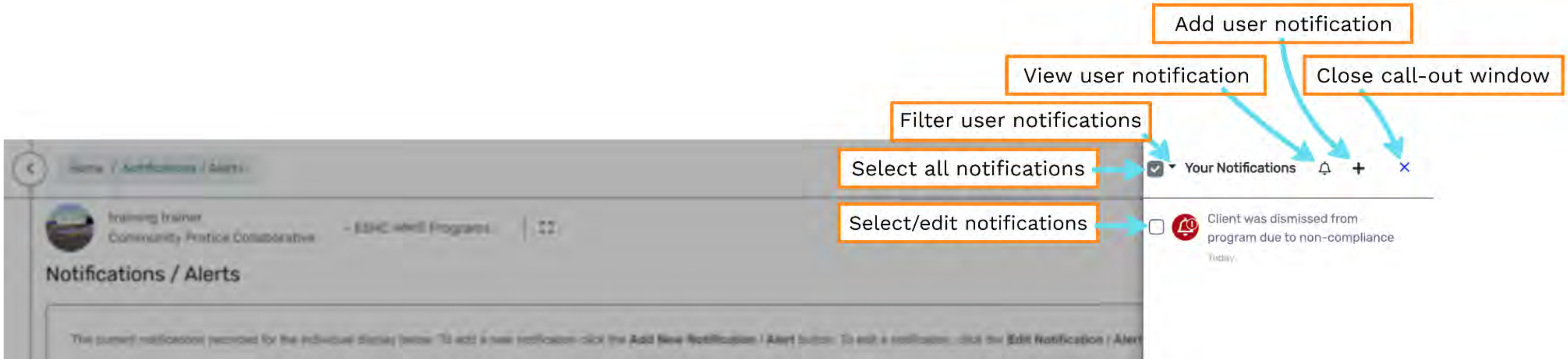


Figure 2-16 – User Notification Bell

Step 2: A call-out window will display any notifications created by clicking on the bell. To view a notification, click on the view notification icon in the call-out window. ClientTrack will navigate to the “Notification / Alerts” workspace container.



Client was dismissed from program due to non-compliance

Figure 2-17 – User Notification Call-out Window Anatomy

Step 3: All user notifications will be viewable. To edit a notification, select the edit icon next to the applicable notification.

Step 4: Edit notification as applicable. Click “Save” to save, or “Cancel” if no changes were made. Click “Cancel” from the “Notification / Alerts” menu to be navigated back to the “User Profile” workspace container.

Adding User Notifications through the Notification Bell Icon

Step 1: Click on the (User) “Notifications” icon* is located on the “Navigation Profile Menu”**.

**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”.*

***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”.*

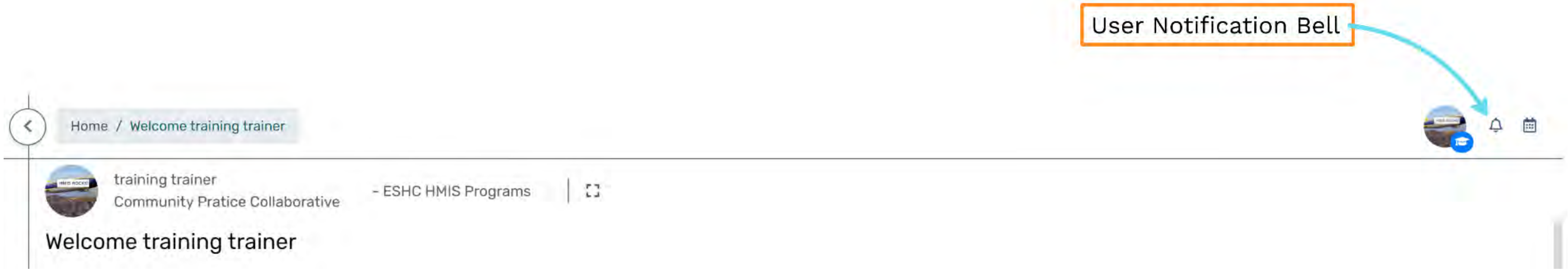
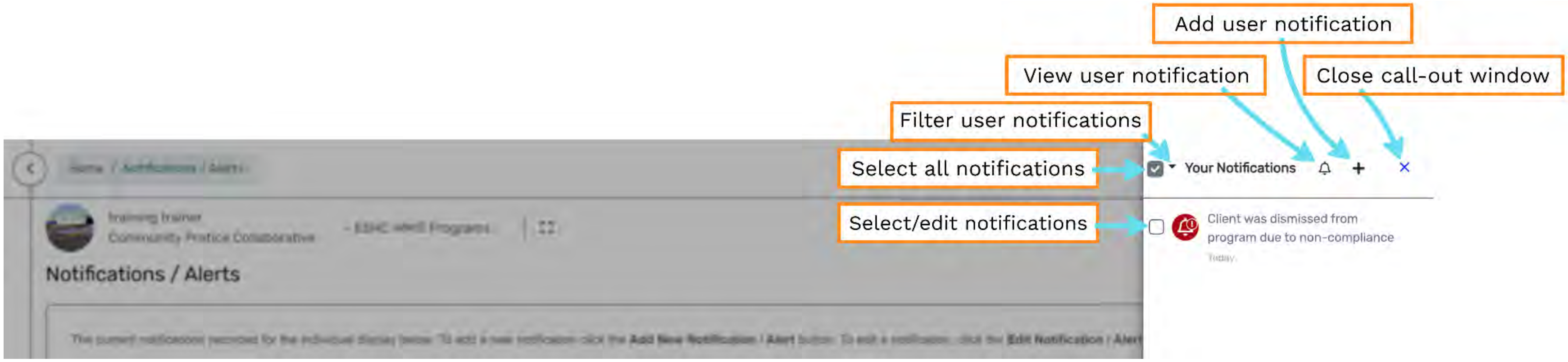


Figure 2-18 – User Notification Bell

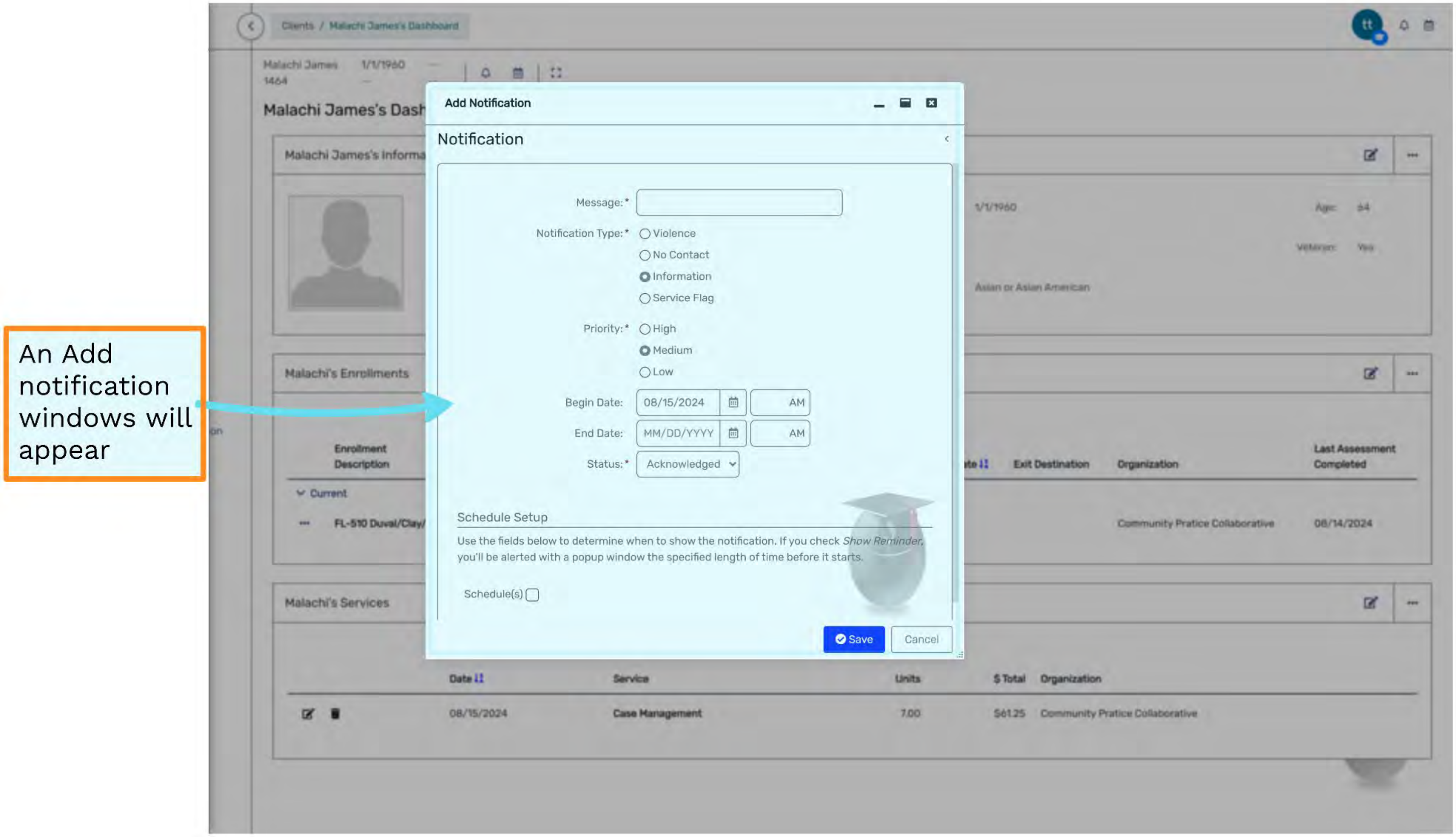
Step 2: A call-out window will display any notifications created by clicking on the bell. To add a notification, click on the add notification icon in the call-out window. An “Add Notification” pop-up window will appear.



Client was dismissed from program due to non-compliance

Today

Figure 2-19 – User Notification Call-out Window Anatomy



An Add notification windows will appear

Add Notification

Notification

Message: *

Notification Type: *
○ Violence
○ No Contact
● Information
○ Service Flag

Priority: *
○ High
● Medium
○ Low

Begin Date: 08/15/2024 AM

End Date: MM/DD/YYYY AM

Status: * Acknowledged

Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.

Schedule(s) ☐

Figure 2-20 – Adding Client Notifications

Step 4: Complete the form as applicable. Required elements are marked with a (*).

Step 5: Click “Save”. ClientTrack will navigate to the “Notifications / Alerts” page.   The notification bell in the entity bar will update.

Workspaces

There are two Workspaces* in ClientTrack. They are separated by tasks and what functions you need to access in ClientTrack. The Workspaces can be accessed by clicking on the icon** from the Sidebar*. Each workspace corresponds with a specific Secondary Sidebar located directly to the right of the Sidebar.

**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".*

***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".*

Sidebar and Secondary Sidebar General Anatomy – Home Workspace and Client Workspace

Home Workspace

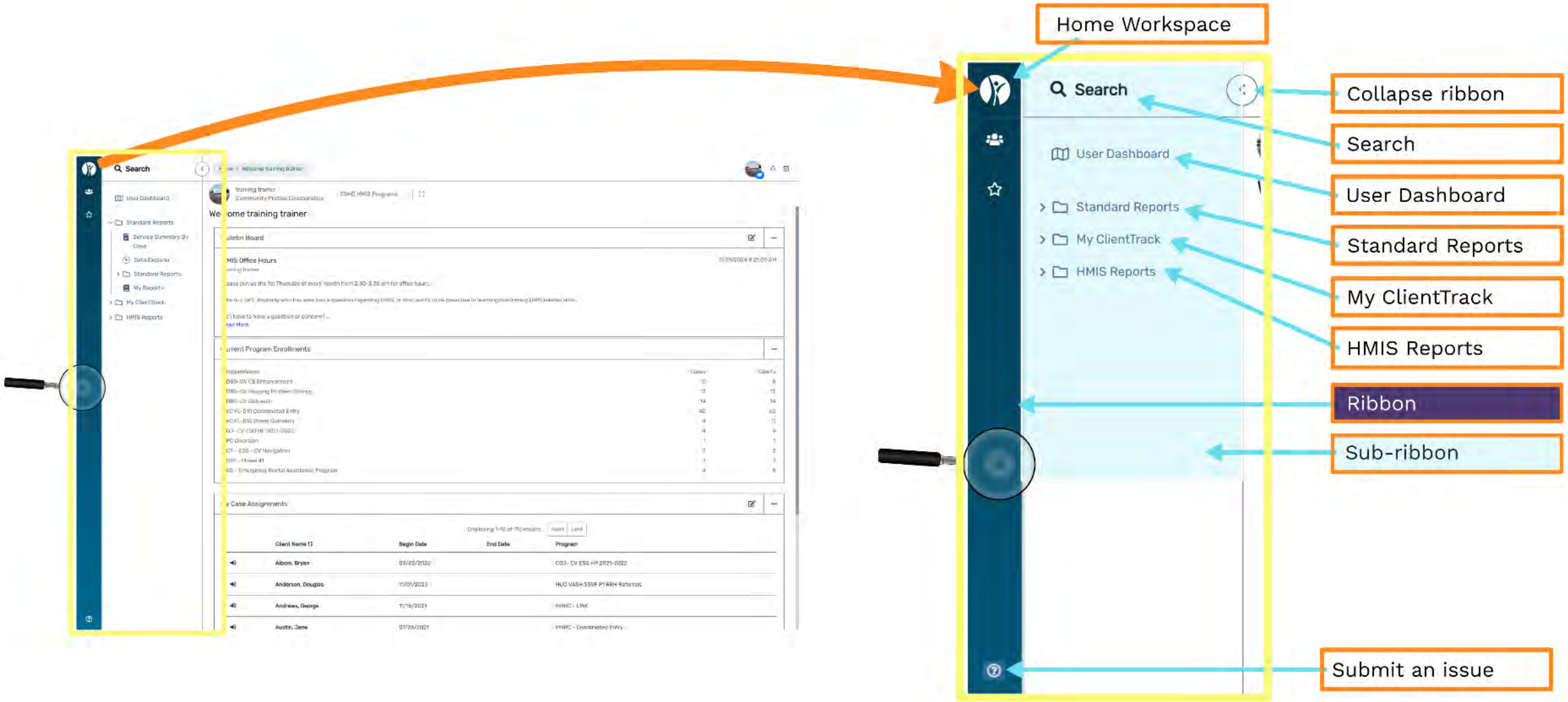


Figure 2-21 - Home Workspace Anatomy

Client Workspace

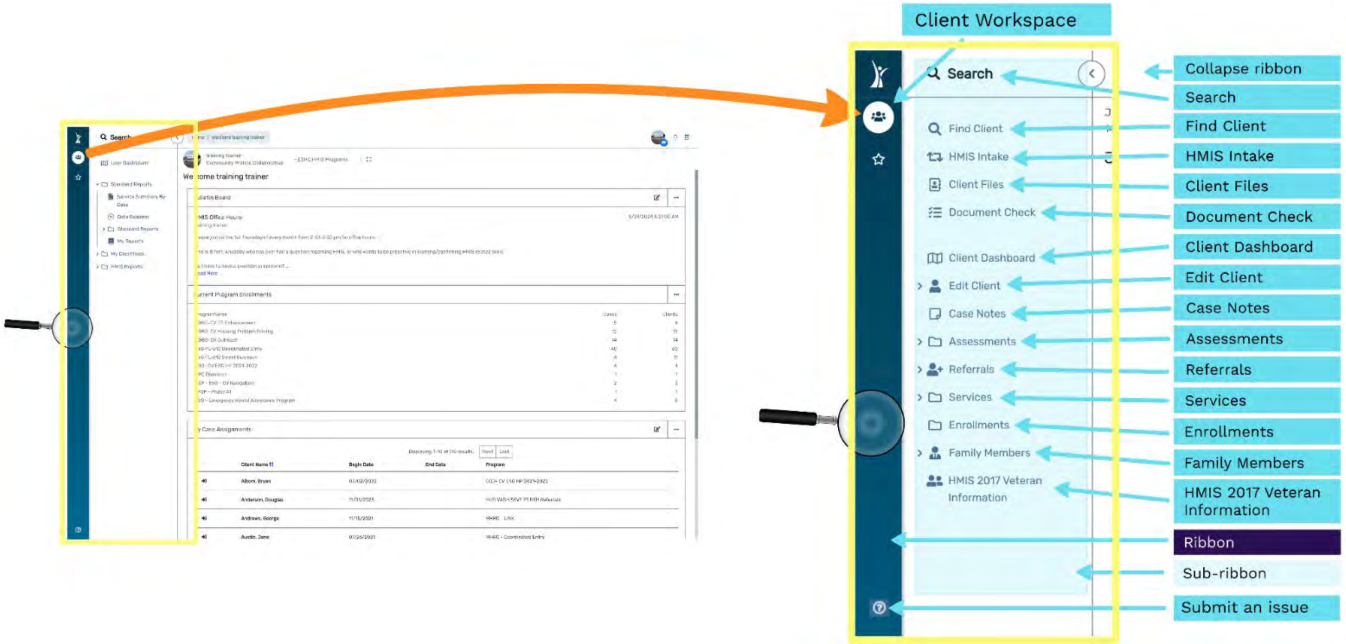


Figure 2-22 – Client Workspace Anatomy

Chapter 3 : Home Workspace: Menu Options, Folders, and Subfolders

This section goes over many of the menu options available in the “Home 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”.

- User Dashboard: Folder
- Standard Reports: Folder
- My ClientTrack: Folder
- HMIS Reports: Folder

User Dashboard: Folder

The “User Dashboard” provides snapshots of specific information.

The “User Dashboard” displays:

- Bulletin Board
- Current Program Enrollments
- My Case Assignments

When selecting the “Home” workspace for the first time after logging in, ClientTrack defaults to “User Dashboard” workspace container. The entity bar will display basic user information.

Steps to Navigate to the “My ClientTrack” Folder Menu

Step 1: Navigate to the Home Workspace*.

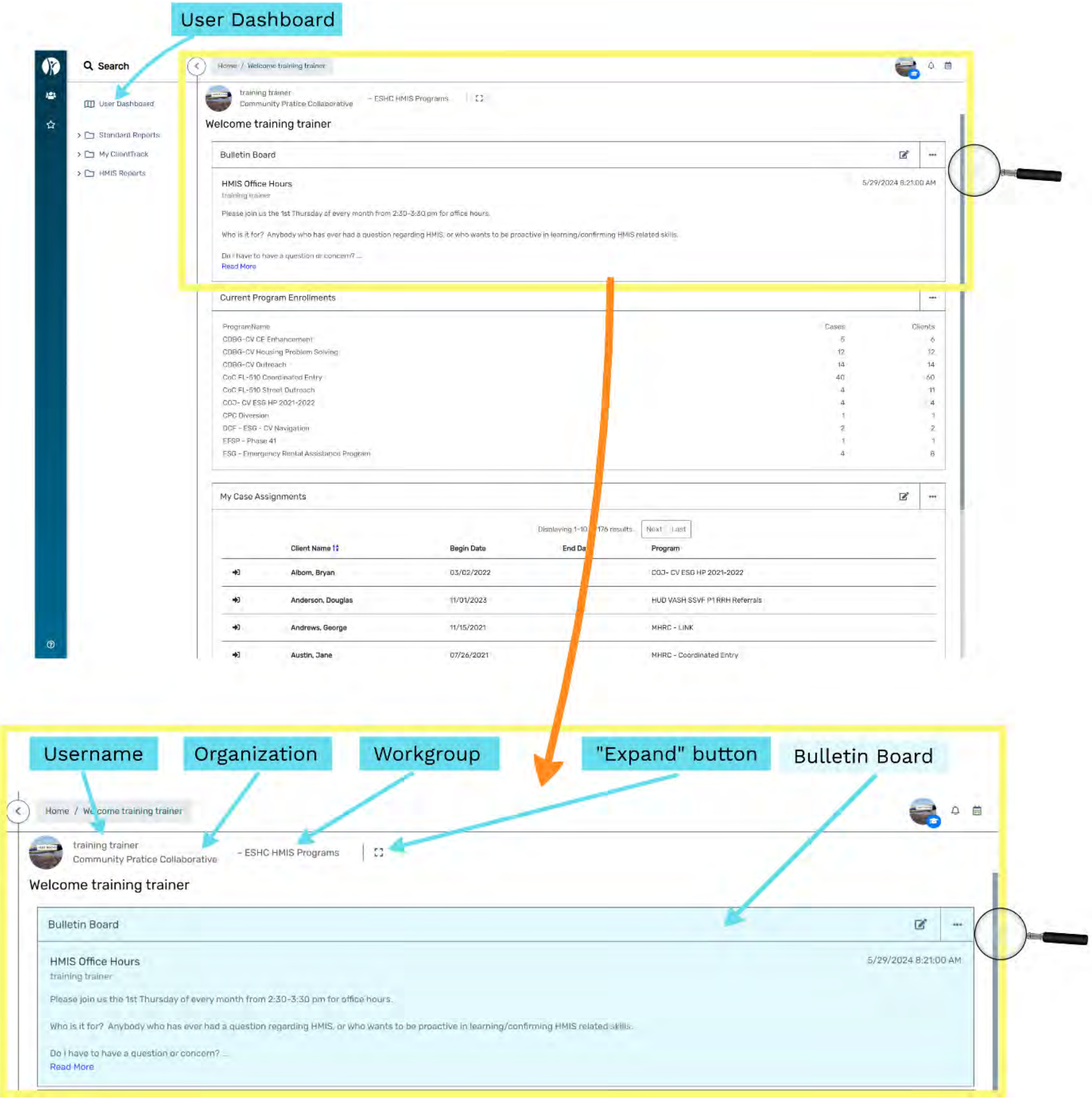
**To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “User Dashboard” secondary sidebar* menu option.

**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”.*

Bulletin Board

The Bulletin Board is the first section below the Home Workspace entity bar. The Bulletin Board acts as a general communication tool from HMIS admins to HMIS users.



training trainer
Community Pratice Collaborative
– ESHC HMIS Programs

Welcome training trainer

Bulletin Board

HMIS Office Hours
training trainer
5/29/2024 8:21:00 AM

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...
Read More

Current Program Enrollments

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	40	60
CoC FL-510 Street Outreach	4	11
COJ- CV ESG HP 2021-2022	4	4
CPC Diversion	1	1
DCF - ESG - CV Navigation	2	2
EFSP - Phase 41	1	1
ESG - Emergency Rental Assistance Program	4	8

My Case Assignments

Displaying 1-10 176 results. Next Last

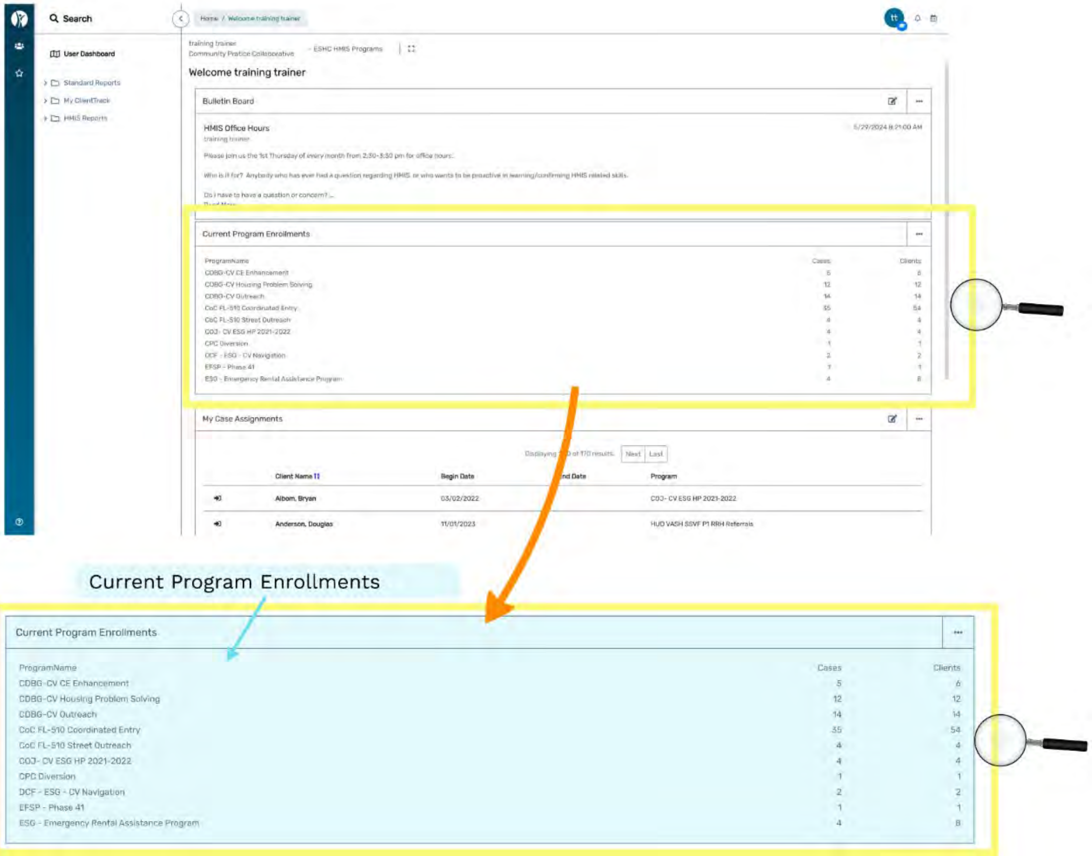
Client Name	Begin Date	End Da	Program
Albom, Bryan	03/02/2022		COJ- CV ESG HP 2021-2022
Anderson, Douglas	11/01/2023		HUD VASH SSVF P1 RRH Referrals
Andrews, George	11/15/2021		MHRC - LINK
Austin, Jane	07/26/2021		MHRC - Coordinated Entry

Figure 3-1 – User Dashboard Basic Anatomy

User Dashboard - Current Program Enrollments

Below the Bulletin Board in the User Dashboard is Current Program Enrollments. Current Program Enrollments provides a snapshot* of a total user's clients across programs. This User Dashboard – Current Program Enrollments is a quick view version.

**To access the full version of Current Program Enrollments, navigate to "My ClientTrack" under the "Current Enrollments" submenu. See Home Workspace: Menu Options, Folders, and Subfolders/Current Enrollments: Subfolder the "HMIS Basic User 2025 Manual" for more detailed information.*



training trainer
Community Pratice Collaborative

Welcome training trainer

Bulletin Board

HMIS Office Hours
training trainer
5/29/2024 8:21:00 AM

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...

Current Program Enrollments

Current Program Enrollments

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	35	54
CoC FL-510 Street Outreach	4	4
COJ- CV ESG HP 2021-2022	4	4
CPC Diversion	1	1
DCF - ESG - CV Navigation	2	2
EFSP - Phase 41	1	1
ESG - Emergency Rental Assistance Program	4	8

My Case Assignments

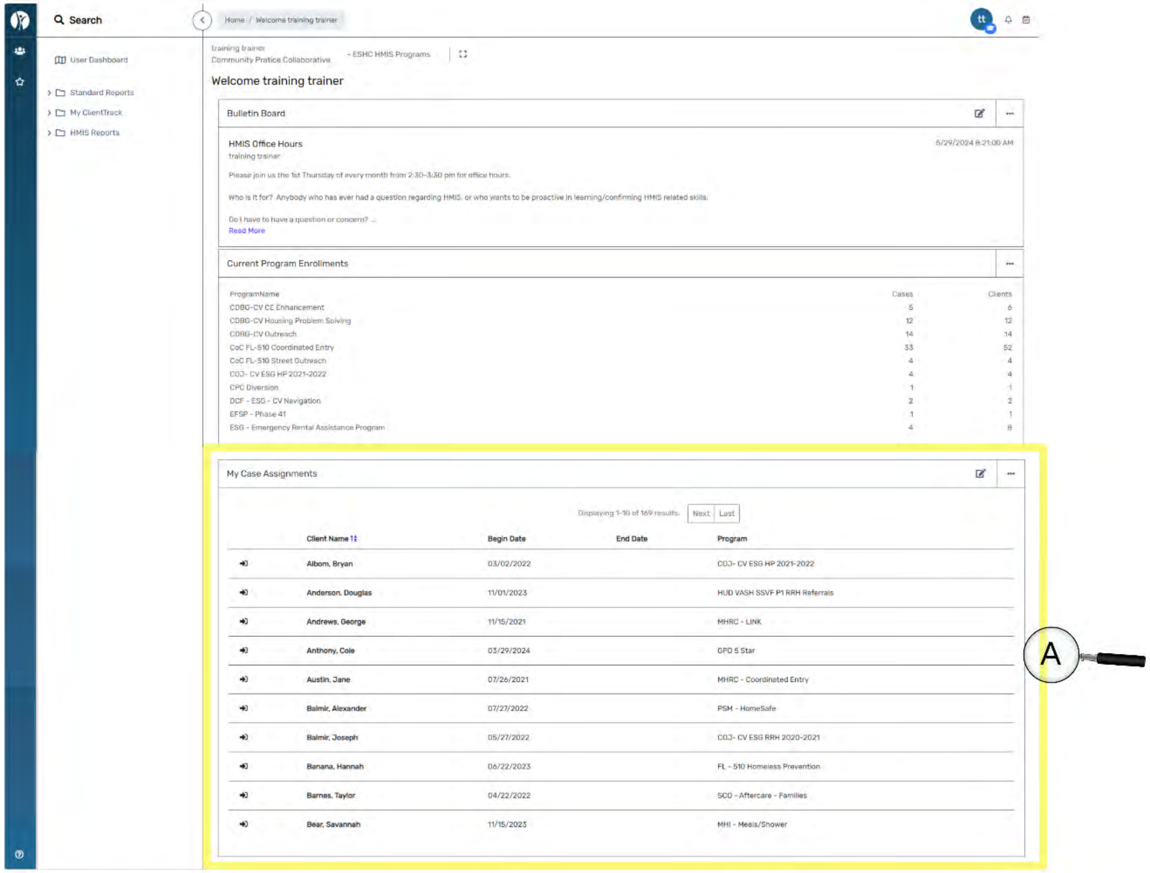
Client Name	Begin Date	End Date	Program
Albom, Bryan	03/02/2022		COJ- CV ESG HP 2021-2022
Anderson, Douglas	11/01/2023		HUD VASH SSVF P1 RRH Referrals

Figure 3-2 - User Dashboard - Current Program Enrollments

User Dashboard – My Case Assignments

Below the Current Program Enrollments is My Case Assignments. My Case Assignments provides a snapshot* of a total user's clients across programs. This User Dashboard - My Case Assignments is a quick view version.

**To access the full version of My Case Assignments, navigate to "My ClientTrack" under the "Active Cases" submenu. See Chapter 3: Home Workspace: Menu Options, Folders, and Subfolders/Active Cases: Subfolder the "HMIS Basic User 2025 Manual".*



HMIS Office Hours
training trainer
5/29/2024 8:21:00 AM

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

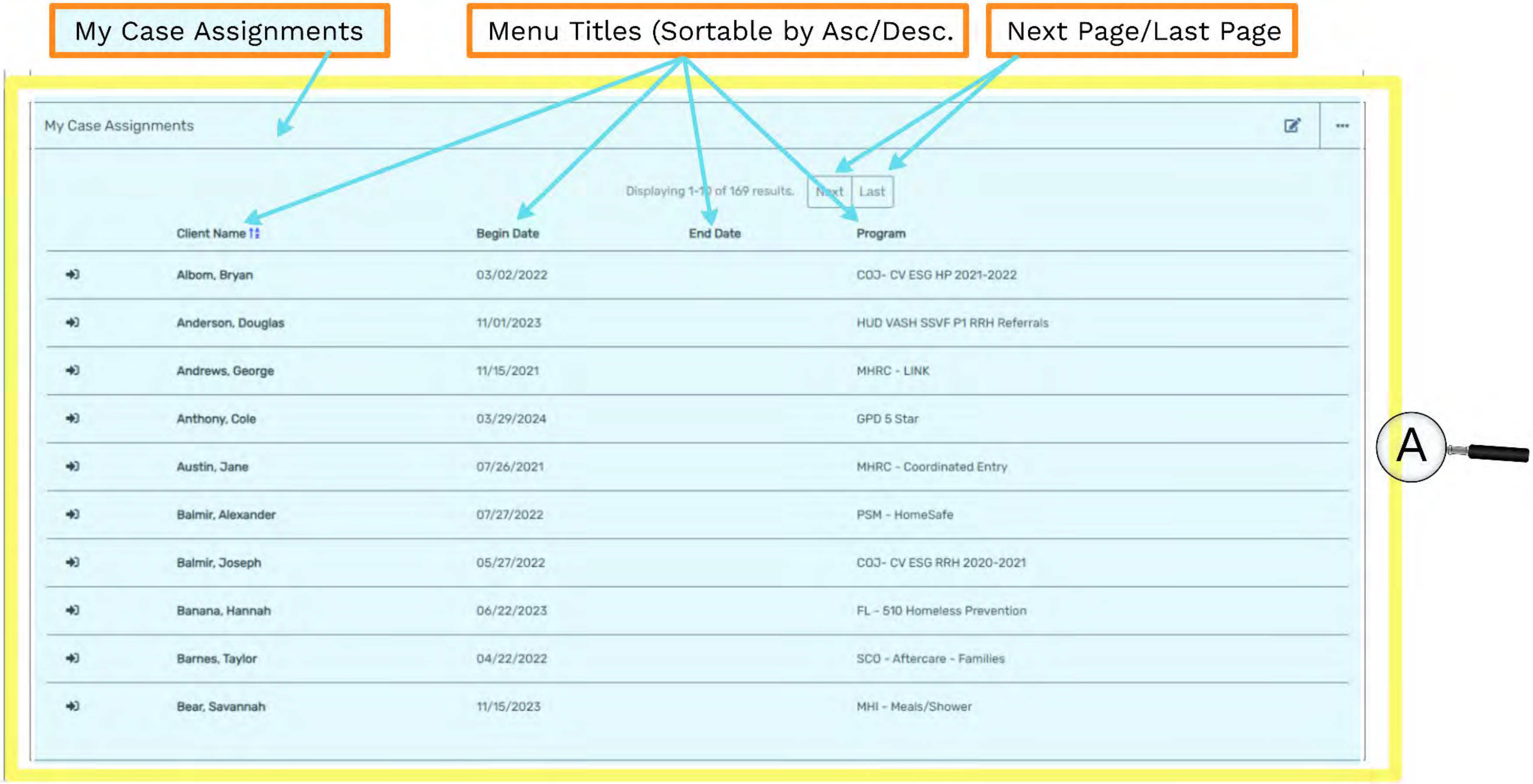
Do I have to have a question or concern? ...
Read More

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	33	52
CoC FL-510 Street Outreach	4	4
COJ- CV ESG HP 2021-2022	4	4
CPC Diversion	1	1
DCF - ESG - CV Navigation	2	2
EFSP - Phase 41	1	1
ESG - Emergency Rental Assistance Program	4	8

Displaying 1-10 of 169 results.

Client Name	Begin Date	End Date	Program
Albom, Bryan	03/02/2022		COJ- CV ESG HP 2021-2022
Anderson, Douglas	11/01/2023		HUD VASH SSVF P1 RRH Referrals
Andrews, George	11/15/2021		MHRC - LINK
Anthony, Cole	03/29/2024		GPD 5 Star
Austin, Jane	07/26/2021		MHRC - Coordinated Entry
Balmir, Alexander	07/27/2022		PSM - HomeSafe
Balmir, Joseph	05/27/2022		COJ- CV ESG RRH 2020-2021
Banana, Hannah	06/22/2023		FL - 510 Homeless Prevention
Barnes, Taylor	04/22/2022		SCO - Aftercare - Families
Bear, Savannah	11/15/2023		MHI - Meals/Shower

Figure 3-3 – User Dashboard – My Case Assignments



My Case Assignments

Displaying 1-10 of 169 results.

	Client Name	Begin Date	End Date	Program
➜]	Albom, Bryan	03/02/2022		COJ- CV ESG HP 2021-2022
➜]	Anderson, Douglas	11/01/2023		HUD VASH SSVF P1 RRH Referrals
➜]	Andrews, George	11/15/2021		MHRC - LINK
➜]	Anthony, Cole	03/29/2024		GPD 5 Star
➜]	Austin, Jane	07/26/2021		MHRC - Coordinated Entry
➜]	Balmir, Alexander	07/27/2022		PSM - HomeSafe
➜]	Balmir, Joseph	05/27/2022		COJ- CV ESG RRH 2020-2021
➜]	Banana, Hannah	06/22/2023		FL - 510 Homeless Prevention
➜]	Barnes, Taylor	04/22/2022		SCO - Aftercare - Families
➜]	Bear, Savannah	11/15/2023		MHI - Meals/Shower

Figure 3-4.z – User Dashboard – My Case Assignments

Standard Reports: Folder

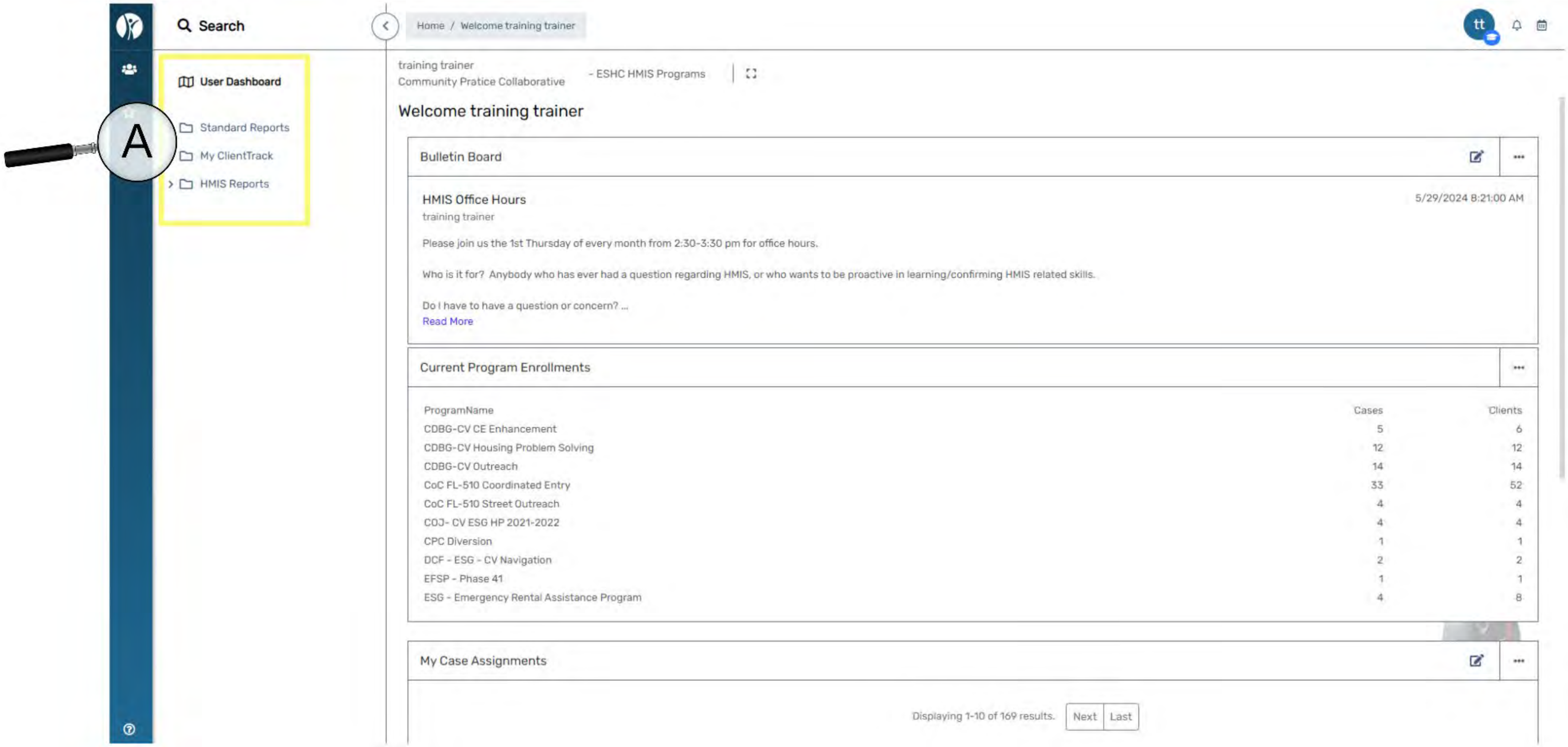
Standard Reports allows users to run basic HMIS reports regarding a variety of data elements. Standard Reports training, as well as HMIS reports training, is offered to users on an individual basis requested by the user/supervisor. To request a reports training, reach out to hmis@changinghomelessness.org for more information.

Tutorials on how to run various HMIS reports can be found at chiedconnect.net in the Reports course found in the Self-Enroll Courses section. For more information on how to register for chiedconnect.net as well as other online resources, go to Introduction/Online Resources in the "HMIS Basic User 2025 Manual"

HMIS
How-To Tutorials

For Self-Enroll online reports training on Moodle, scan the QR code

Figure 3-5 – chiedconnect.edu Reports training QR Code



HMIS Office Hours

training trainer

5/29/2024 8:21:00 AM

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...

Read More

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	33	52
CoC FL-510 Street Outreach	4	4
COJ- CV ESG HP 2021-2022	4	4
CPC Diversion	1	1
DCF - ESG - CV Navigation	2	2
EFSP - Phase 41	1	1
ESG - Emergency Rental Assistance Program	4	8

Displaying 1-10 of 169 results.

Figure 3-6 – Standard Reports

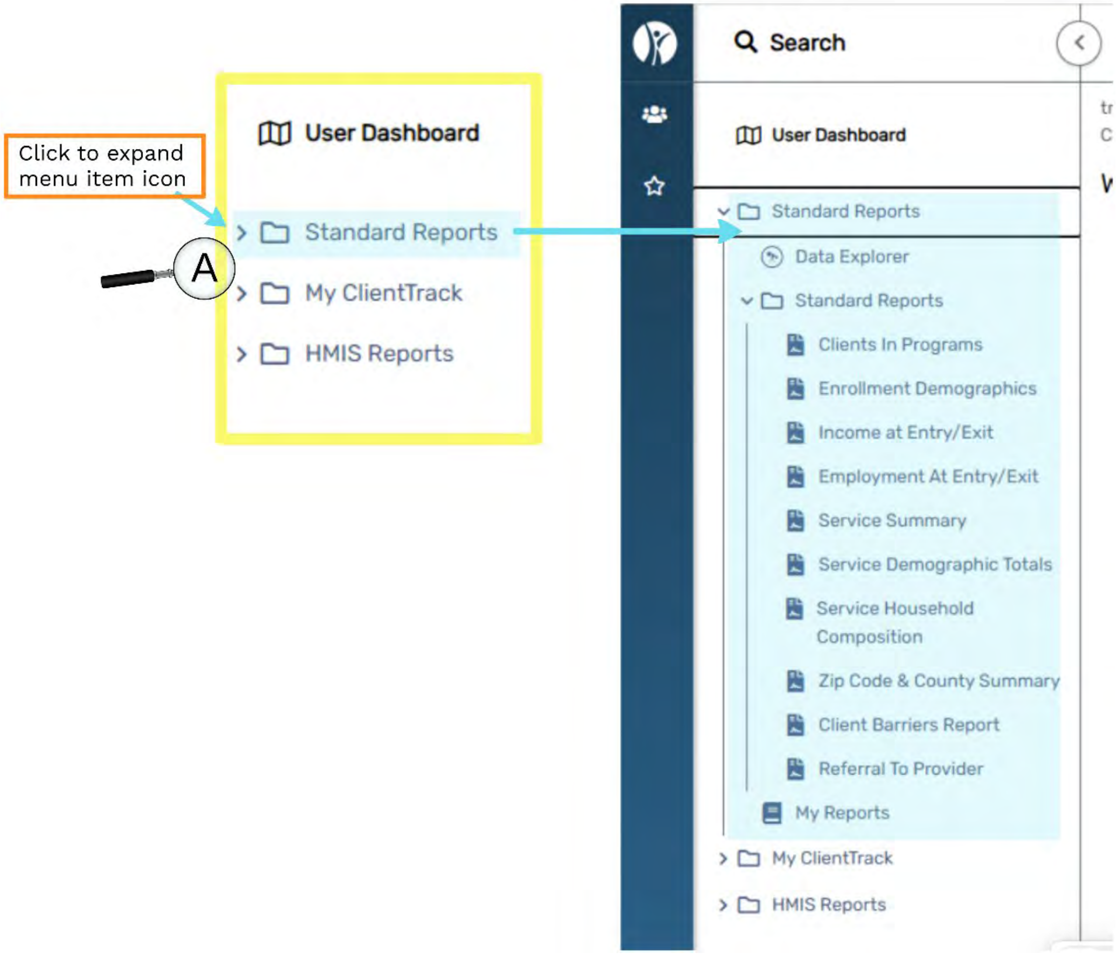


Figure 3-7.z – Standard Reports

My ClientTrack: Folder

My ClientTrack contains the following subfolders:

- Active Cases: Subfolder
- Recent: Subfolder
- Chronic Homeless Status: Subfolder
- Current Enrollments: Subfolder
- My User Configuration: Subfolder
- Paused Operations: Subfolder
- My Submitted Issues: Subfolder

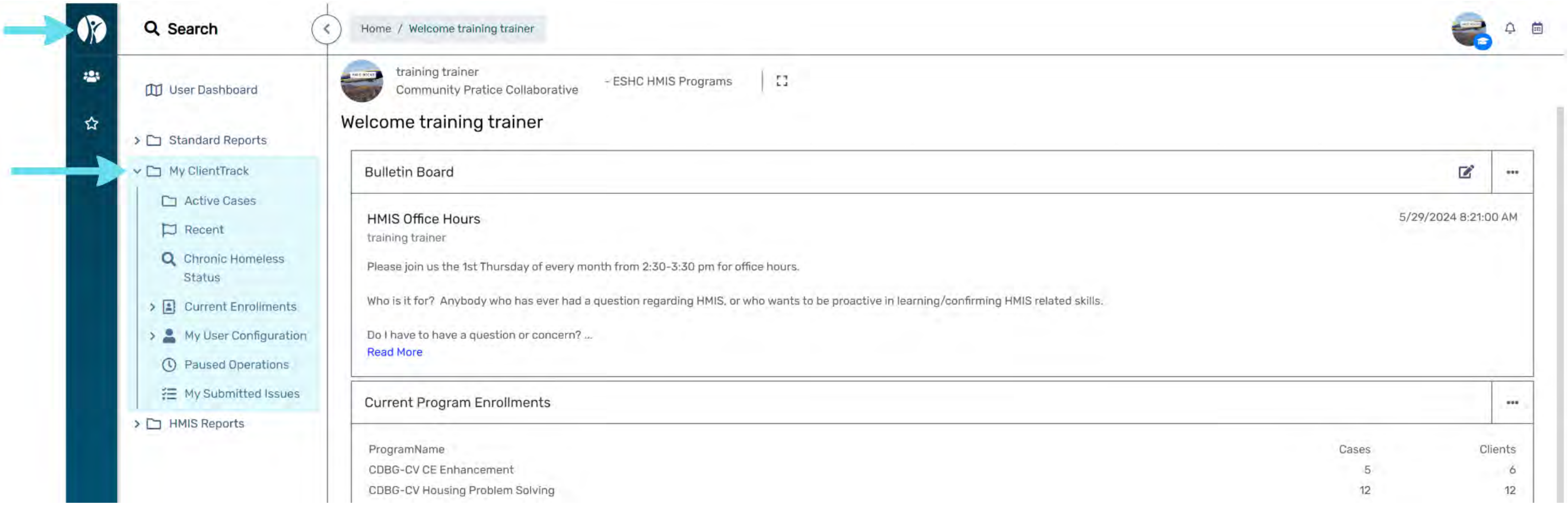
Steps to Navigate to the "My ClientTrack" Folder Menu

Step 1: Navigate to the Home 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 "My ClientTrack" secondary sidebar* menu option.

**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".*



HMIS Office Hours
training trainer
5/29/2024 8:21:00 AM

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...
Read More

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12

Figure 3-8 – My ClientTrack

Active Cases: Subfolder

The “Active Cases” subfolder displays a user’s active case assignments.

<u>Steps to Navigate to the “Active Cases” Subfolder Menu and Managing Active Cases</u>

Step 1: Navigate to the Home 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 "My ClientTrack" secondary sidebar menu option. A dropdown menu will appear under the "My ClientTrack" folder.

**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".*

Step 3.1 Selecting Clients: Select the "Active Cases" secondary sidebar menu option. ClientTrack will navigate to the "Active Case Assignments" workspace container.

To select a client, click the select icon* next to the appropriate client. ClientTrack will navigate to the client's dashboard and switch from the Home Workspace to the Client Workspace.

**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".*

Step 3.2: Managing Active and Inactive Cases – 2 Methods

Method #1 of 2

Select the "View Inactive Cases" button* on the top right corner of the "Active Case Assignments" workspace container. Client Track will navigate to the "Inactive Case Assignments" 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".*

Step 4: Click the edit icon next to the appropriate client. ClientTrack will navigate to the "Client Case Assignment" workspace container form.

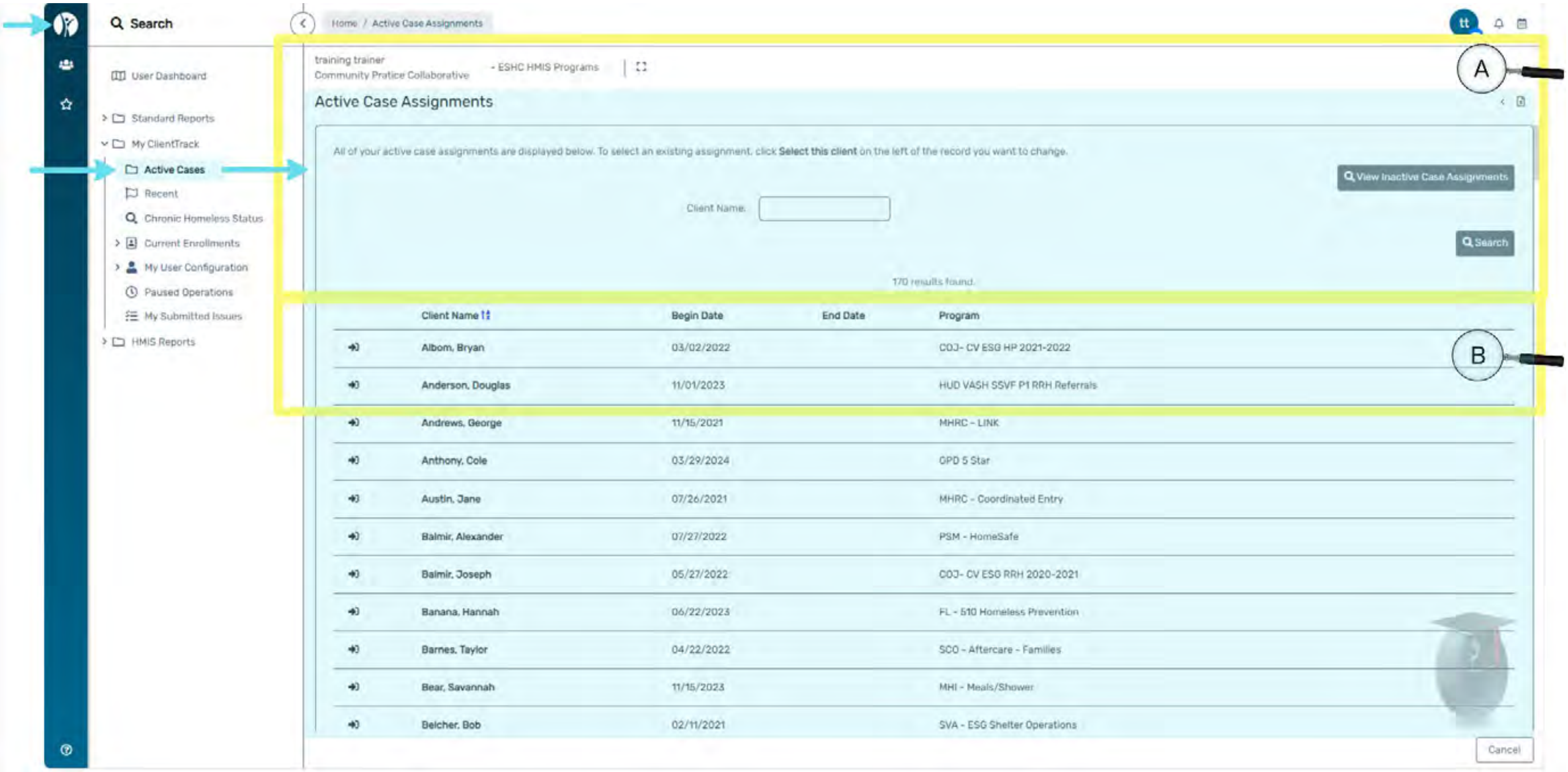
Step 5: Select the “Status” box and select the “active” to change the client’s status.

Step 6: Click “Save” to close. Click “Cancel” to exit without saving. ClientTrack will navigate to the “Client Case” Assignment” workspace container and the newly activated client will be removed from the populated list.

Method #2 of 2

Managing Active and Inactive Cases through “Case Manager Assignments”* in the Edit Client subfolder.

** For information and instructions on managing case assignments through the “Case Manager Assignment” subfolder, see Chapter 4: Client Workspace: Menu Options, Folder, and Subfolders/Edit Client: Folder/Case Managers: Subfolder*



Active Case Assignments

All of your active case assignments are displayed below. To select an existing assignment, click **Select this client** on the left of the record you want to change.

170 results found.

	Client Name	Begin Date	End Date	Program
➜	Albom, Bryan	03/02/2022		COJ- CV ESG HP 2021-2022
➜	Anderson, Douglas	11/01/2023		HUD VASH SSVF P1 RRH Referrals
➜	Andrews, George	11/15/2021		MHRC – LINK
➜	Anthony, Cole	03/29/2024		GPD 5 Star
➜	Austin, Jane	07/26/2021		MHRC - Coordinated Entry
➜	Balmir, Alexander	07/27/2022		PSM - HomeSafe
➜	Balmir, Joseph	05/27/2022		COJ- CV ESG RRH 2020-2021
➜	Banana, Hannah	06/22/2023		FL - 510 Homeless Prevention
➜	Barnes, Taylor	04/22/2022		SCO - Aftercare - Families
➜	Bear, Savannah	11/15/2023		MHI - Meals/Shower
➜	Belcher, Bob	02/11/2021		SVA - ESG Shelter Operations

Figure 3-9 – Active Cases

training trainer
Community Pratice Collaborative - ESHC HMIS Programs

Active Case Assignments

All of your active case assignments are displayed below. To select an existing assignment, click **Select this client** on the left of the record you want to change.

Client Name:

170 results found.

	Client Name	Begin Date	End Date	Program
	Albom, Bryan	03/02/2022		COJ- CV ESG HP 2021-2022
	Anderson, Douglas	11/01/2023		HUD VASH SSVF P1 RRH Referrals

Client name search box

Click to view inactive case assignments

Click to sort

Clicking icon will take you to the client's profile in the Client Workspace

Figure 3-10.z – Active Cases

Active Cases – Reassigning Case Managers

To reassign cases via the “Case Load Reassignment”* tool, a user will need access to “HMIS Reports.” To request access, email hmis@changinghomelessness.org.

**For information and instructions on the Case Load Reassignment subfolder, see Chapter 3: Home Workspace: Menu Options, Folders, and Subfolders/HMIS Reports: Folder/Case Load Reassignment: Subfolder in the “HMIS Basic User 2025 Manual”.*

Recent: Subfolder

The “Recent” subfolder is a quick way to access any of the last 5 clients profiles accessed by the user in the system.

Steps to Navigate to the “Recent” Subfolder Menu

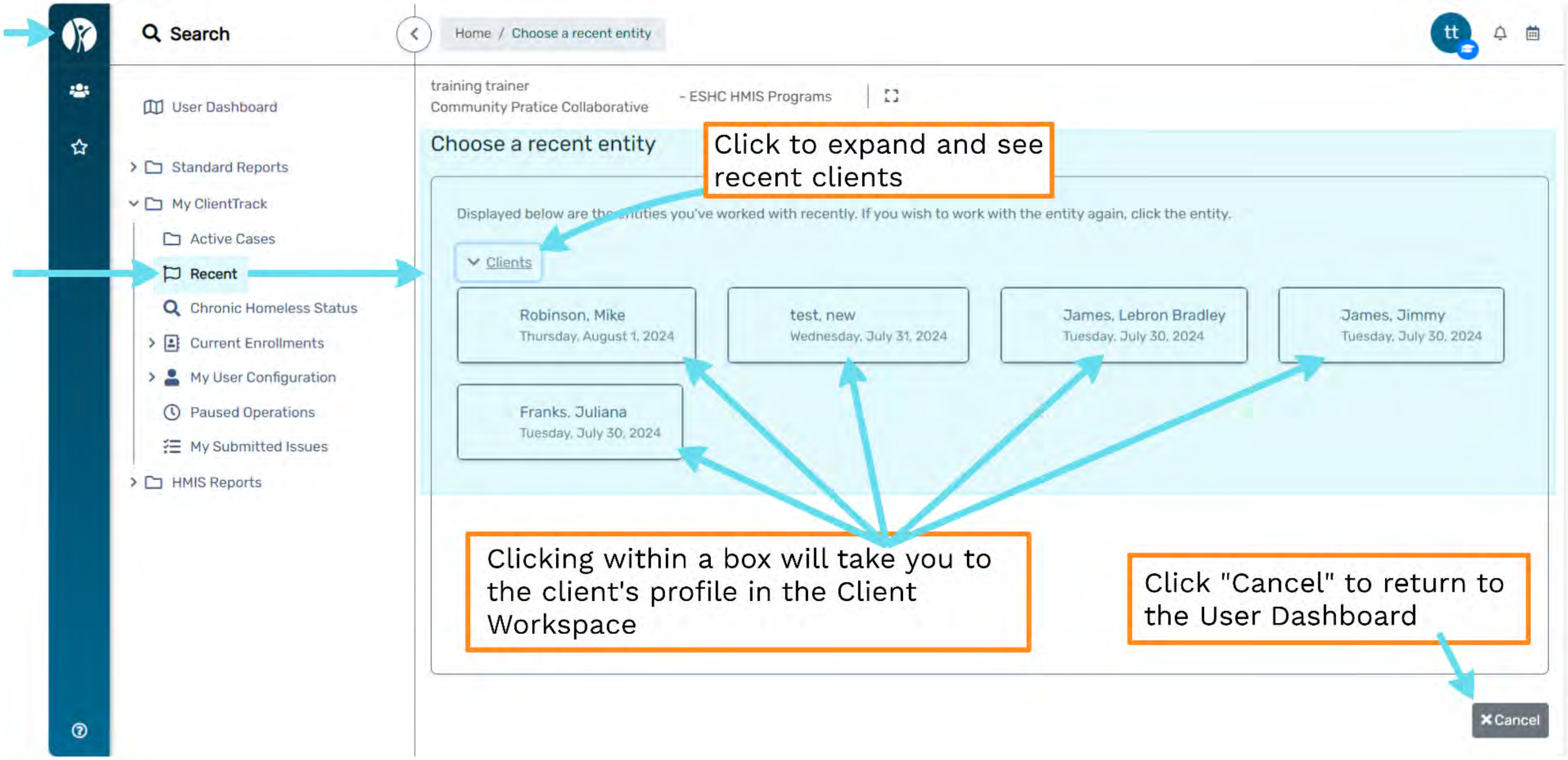
Step 1: Navigate to the Home Workspace*.

**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 “My ClientTrack” folder secondary sidebar* menu option. A dropdown menu will appear under the “My ClientTrack” folder.

** 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”.*

Step 3: Select the “Recent” secondary sidebar menu option. ClientTrack will navigate to the “Choose a recent entity” workspace container.



training trainer
Community Pratice Collaborative - ESHC HMIS Programs

Choose a recent entity

Displayed below are the entities you've worked with recently. If you wish to work with the entity again, click the entity.

Robinson, Mike
Thursday, August 1, 2024

test, new
Wednesday, July 31, 2024

James, Lebron Bradley
Tuesday, July 30, 2024

James, Jimmy
Tuesday, July 30, 2024

Franks, Juliana
Tuesday, July 30, 2024

Click to expand and see recent clients

Clicking within a box will take you to the client's profile in the Client Workspace

Click "Cancel" to return to the User Dashboard

Figure 3-11 – Recent Clients

Tips and Tricks - *Recent Clients in "Quick Search"*

Did you know?

- Your 5 most recent clients "Recent subfolder" can also be found in the "Quick Search" window's call-out bar.

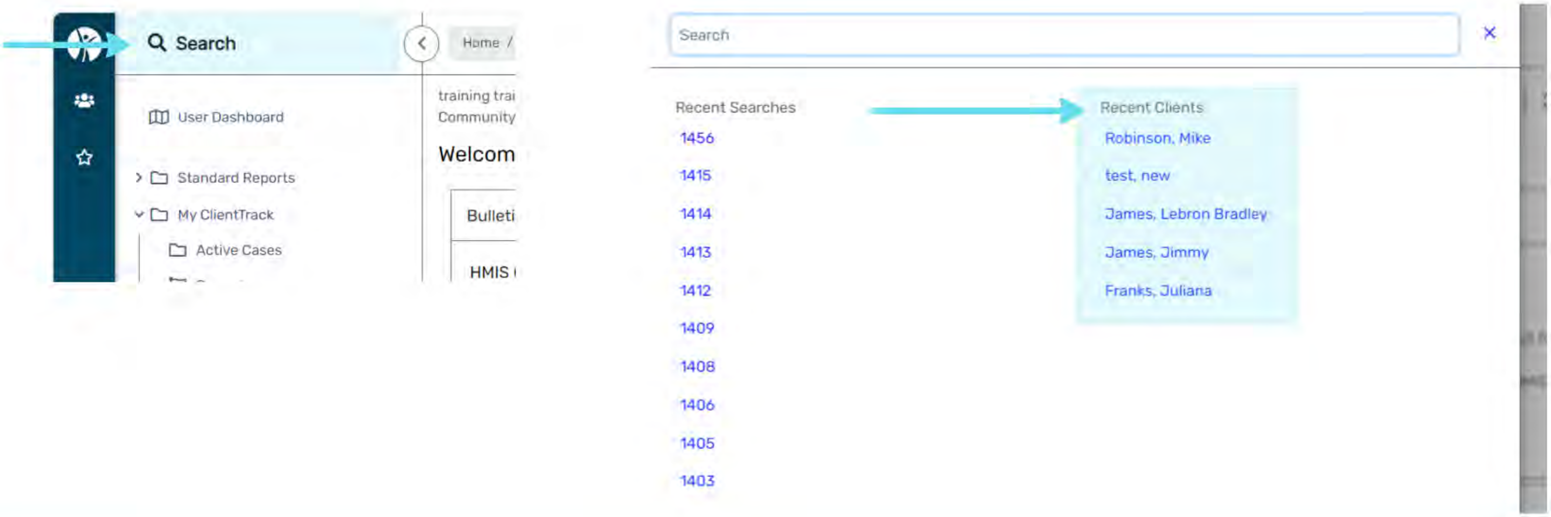


Figure 3-12 – Tips and Tricks – Recent Clients

Chronic Homeless Status: Subfolder

Chronic Homeless Status is a search menu in which clients that fit HUD's definition of "Chronically Homeless". The definition of Chronic Homelessness can be found on the HUD Exchange website https://www.hudexchange.info/homelessness-assistance/coc-esg-virtual-binders/coc-esg-homeless-eligibility/definition-of-chronic-homelessness/

Steps to Navigate to the "Chronic Homeless Status" Subfolder Menu

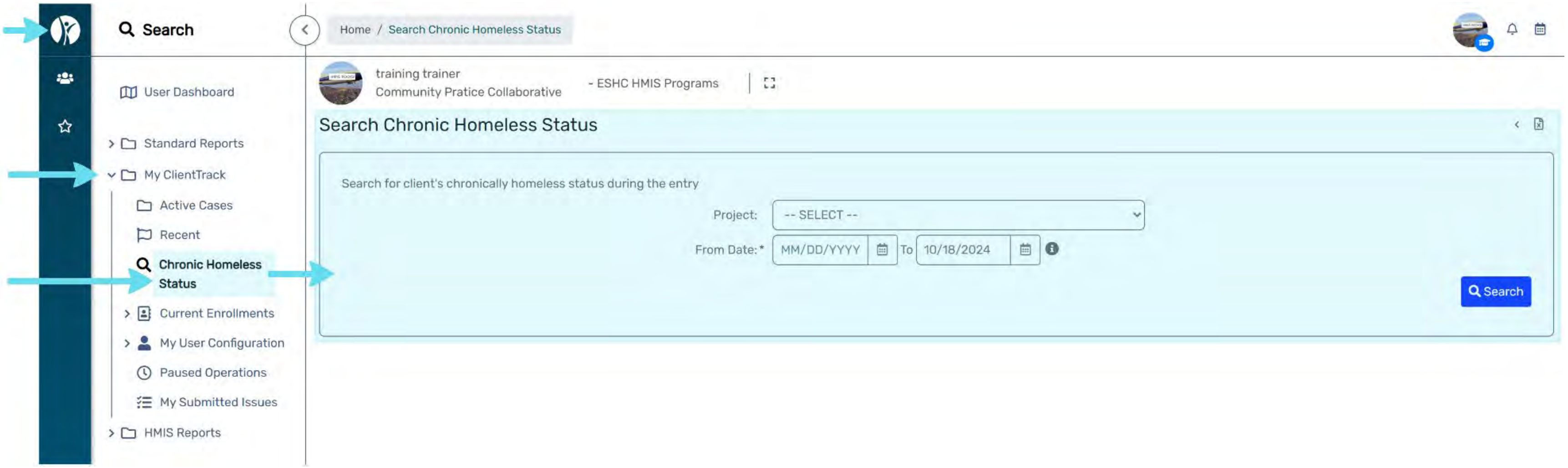
Step 1: Navigate to the Home Workspace*.

**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 "My ClientTrack" secondary sidebar* menu option. A dropdown menu will appear under the "My ClientTrack" folder.

**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".*

Select the "Chronic Homeless Status" secondary sidebar menu option. ClientTrack will navigate to the "Search Chronic Homeless Status" workspace container.



Search for client's chronically homeless status during the entry

Project: -- SELECT --

From Date:* MM/DD/YYYY To 10/18/2024

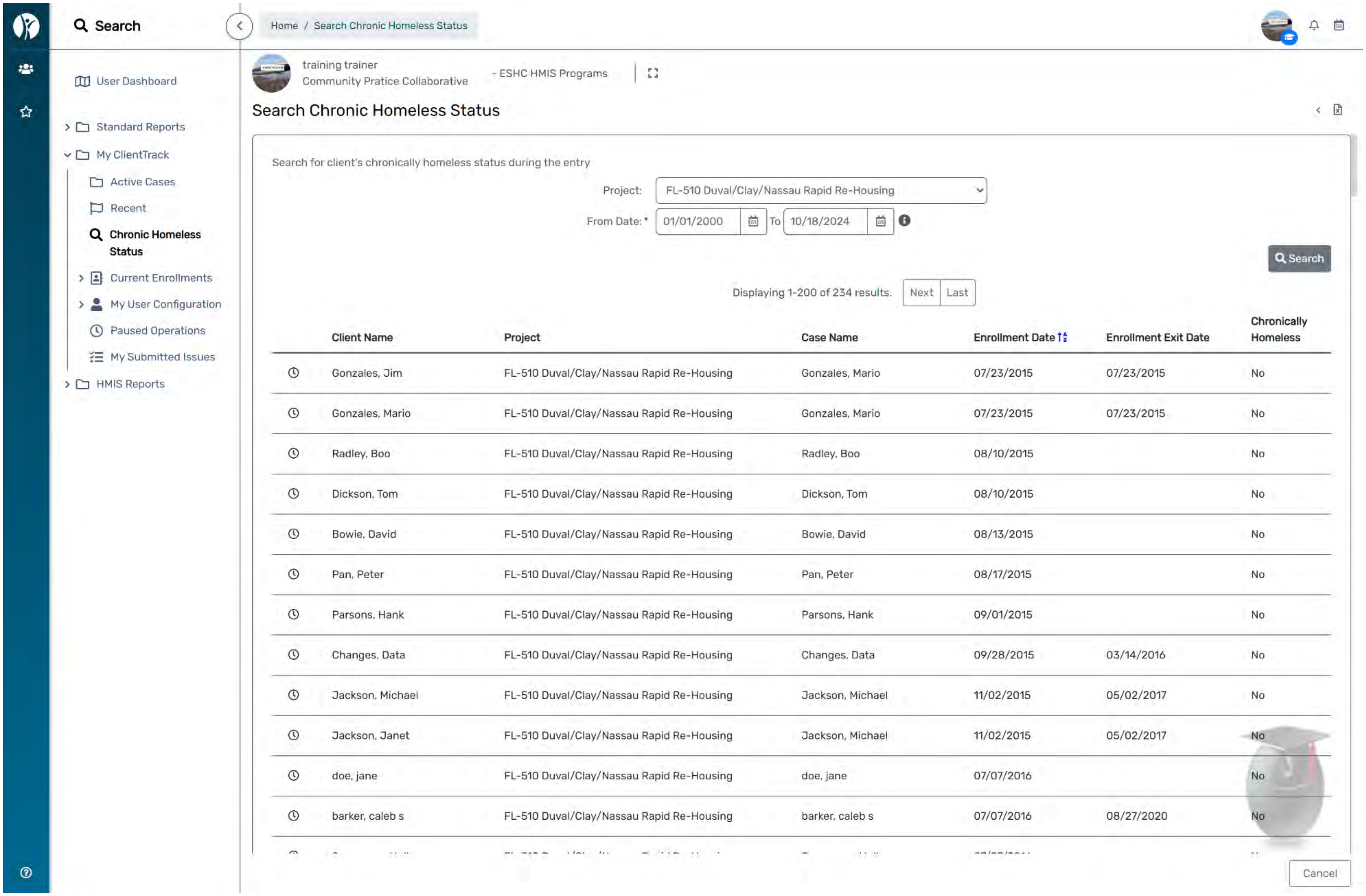
Figure 3-13 – Chronic Homeless Status

Steps to Populate "Chronic Homeless Status" Subfolder Menu

Step 1: Select the Project by clicking in the "Project" box and selecting the appropriate program from the drop-down list.

Step 2: Enter the appropriate From Date and To Date.

Step 3: Click Search button to populate results.



Search Chronic Homeless Status

Search for client's chronically homeless status during the entry

Project: FL-510 Duval/Clay/Nassau Rapid Re-Housing

From Date:* 01/01/2000 To 10/18/2024

Displaying 1-200 of 234 results.

Client Name	Project	Case Name	Enrollment Date	Enrollment Exit Date	Chronically Homeless
Gonzales, Jim	FL-510 Duval/Clay/Nassau Rapid Re-Housing	Gonzales, Mario	07/23/2015	07/23/2015	No
Gonzales, Mario	FL-510 Duval/Clay/Nassau Rapid Re-Housing	Gonzales, Mario	07/23/2015	07/23/2015	No
Radley, Boo	FL-510 Duval/Clay/Nassau Rapid Re-Housing	Radley, Boo	08/10/2015		No
Dickson, Tom	FL-510 Duval/Clay/Nassau Rapid Re-Housing	Dickson, Tom	08/10/2015		No
Bowie, David	FL-510 Duval/Clay/Nassau Rapid Re-Housing	Bowie, David	08/13/2015		No
Pan, Peter	FL-510 Duval/Clay/Nassau Rapid Re-Housing	Pan, Peter	08/17/2015		No
Parsons, Hank	FL-510 Duval/Clay/Nassau Rapid Re-Housing	Parsons, Hank	09/01/2015		No
Changes, Data	FL-510 Duval/Clay/Nassau Rapid Re-Housing	Changes, Data	09/28/2015	03/14/2016	No
Jackson, Michael	FL-510 Duval/Clay/Nassau Rapid Re-Housing	Jackson, Michael	11/02/2015	05/02/2017	No
Jackson, Janet	FL-510 Duval/Clay/Nassau Rapid Re-Housing	Jackson, Michael	11/02/2015	05/02/2017	No
doe, jane	FL-510 Duval/Clay/Nassau Rapid Re-Housing	doe, jane	07/07/2016		No
barker, caleb s	FL-510 Duval/Clay/Nassau Rapid Re-Housing	barker, caleb s	07/07/2016	08/27/2020	No

Figure 3-14 – Chronic Homeless Status Populated Results

Current Enrollments: Subfolder

The “Current Enrollments” menu option will display all open enrollments filtered by program. It may list more than just a singles user’s clients if there are multiple Case Managers that are working under the same Program. Viewing “Current Enrollments” may be helpful in the case that there are limits on how many clients can be enrolled in a program.

This list only shows open enrollments so any client who was enrolled in the program selected that has been exited will not show up on this list.

Steps to Navigate to the “Current Enrollments” Subfolder Menu

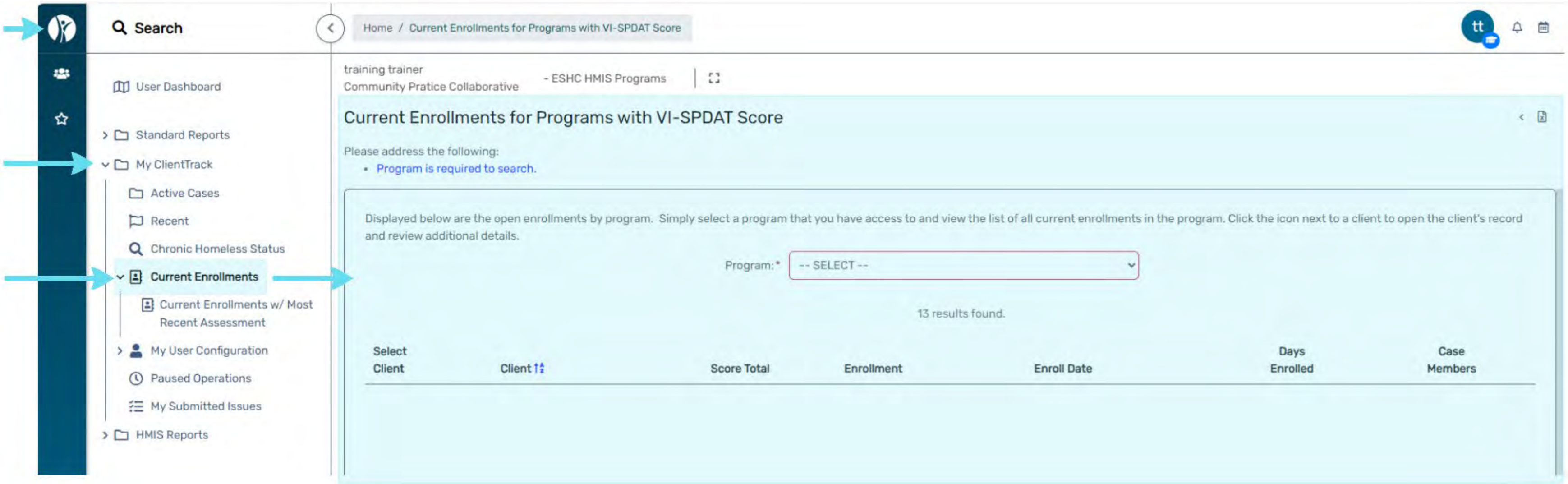
Step 1: Navigate to the Home Workspace*.

**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 “My ClientTrack” secondary sidebar* menu option. A dropdown menu will appear under the “My ClientTrack” folder.

**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”.*

Step 3: Select the “Current Enrollments” secondary sidebar menu option.   ClientTrack will navigate to the “Current Enrollments for Programs with VI-SPDAT Score” workspace container. A dropdown menu will appear under the “Current Enrollments” subfolder.



Current Enrollments for Programs with VI-SPDAT Score

Please address the following:

- Program is required to search.

Displayed below are the open enrollments by program. Simply select a program that you have access to and view the list of all current enrollments in the program. Click the icon next to a client to open the client's record and review additional details.

Program:* -- SELECT --

13 results found.

Select Client	Client	Score Total	Enrollment	Enroll Date	Days Enrolled	Case Members

Figure 3-15 – Current Enrollments

Current Enrollments w/ Most Recent Assessment: Subfolder

The “Current Enrollments w/ Most Recent Assessment” allows users to populate a list of clients and sort clients in a caseload by their last assessment date.

The Current Enrollments w/ Most Recent Assessment doesn’t run on for a specific user. The search will display all open enrollments filtered by program for all users.

<u>Steps to Navigate to the “Current Enrollments w/ Most Recent Assessment” Folder Menu and Populate a list of Clients</u>

Step 1: Navigate to the Home Workspace*.

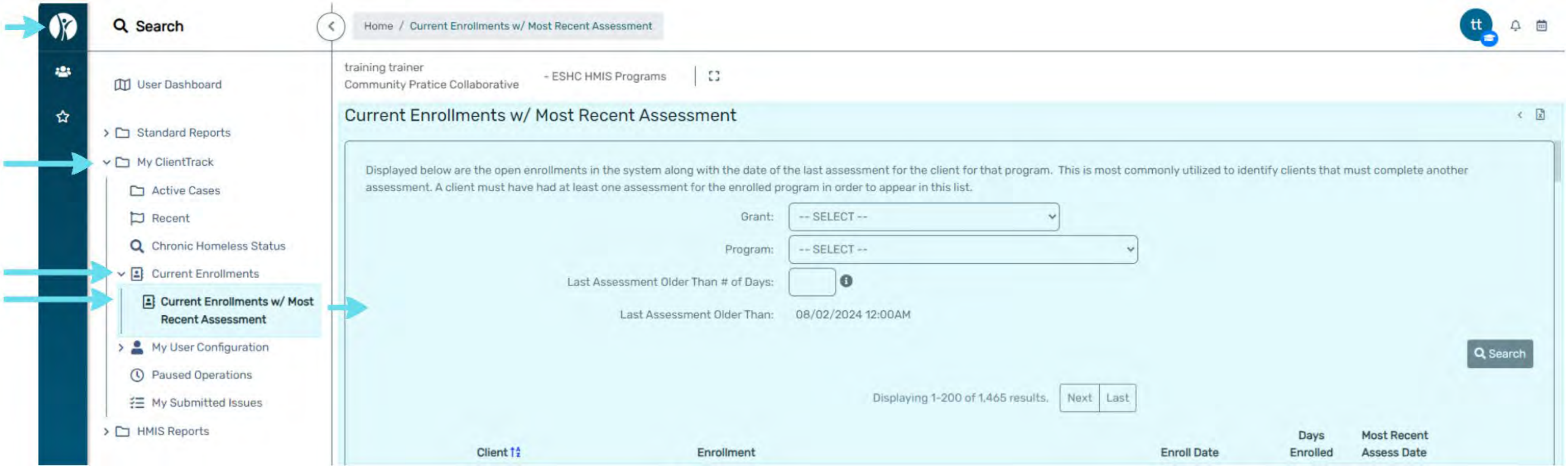
**To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “My ClientTrack” secondary sidebar* menu option. A dropdown menu will appear under the “My ClientTrack” folder.

**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”.*

Step 3: Select the “Current Enrollments” secondary sidebar menu option. A dropdown menu will appear under the “Current Enrollments” subfolder.

Step 4: Select the “Current Enrollments w/ Most Recent Assessment” secondary sidebar menu option. ClientTrack will navigate to the “Current Enrollments w/ Most Recent Assessment” workspace container.



Displayed below are the open enrollments in the system along with the date of the last assessment for the client for that program. This is most commonly utilized to identify clients that must complete another assessment. A client must have had at least one assessment for the enrolled program in order to appear in this list.

Grant: -- SELECT --

Program: -- SELECT --

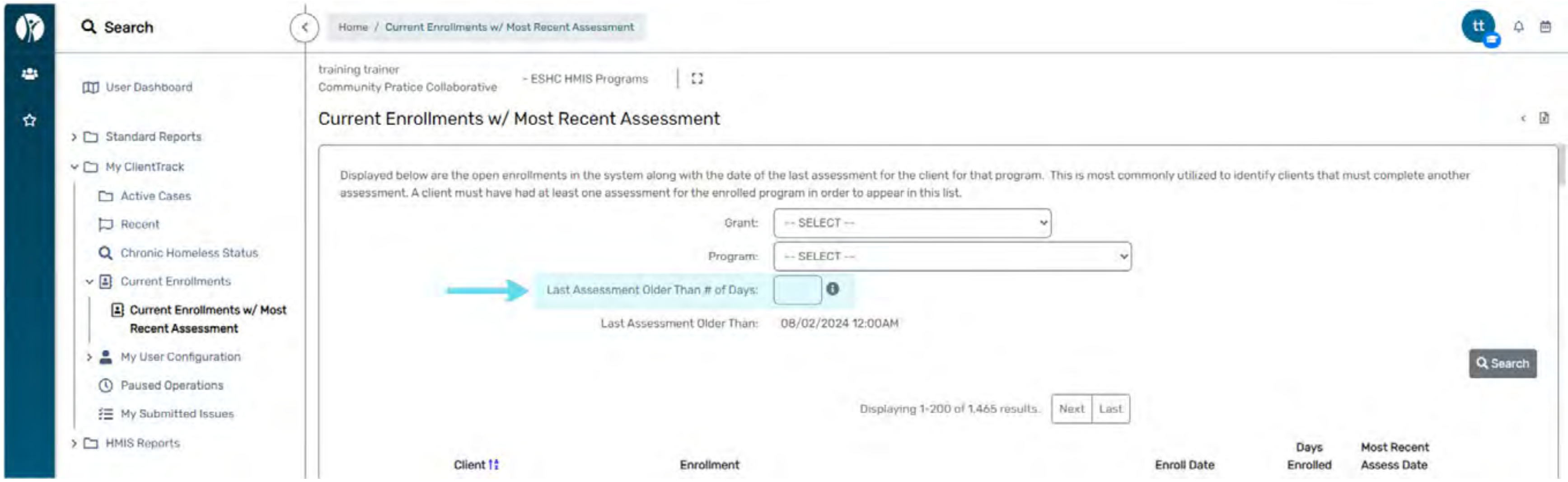
Last Assessment Older Than # of Days:

Last Assessment Older Than: 08/02/2024 12:00AM

Displaying 1-200 of 1,465 results.

Figure 3-16 - Current Enrollments with Most Recent Assessment

Step 4: Select “Grant” type from the dropdown menu if applicable. Select “Program” type from the dropdown menu if applicable. Enter search criteria for “Last Assessment Older Than #of Days:”



Current Enrollments w/ Most Recent Assessment

Displayed below are the open enrollments in the system along with the date of the last assessment for the client for that program. This is most commonly utilized to identify clients that must complete another assessment. A client must have had at least one assessment for the enrolled program in order to appear in this list.

Grant: -- SELECT --

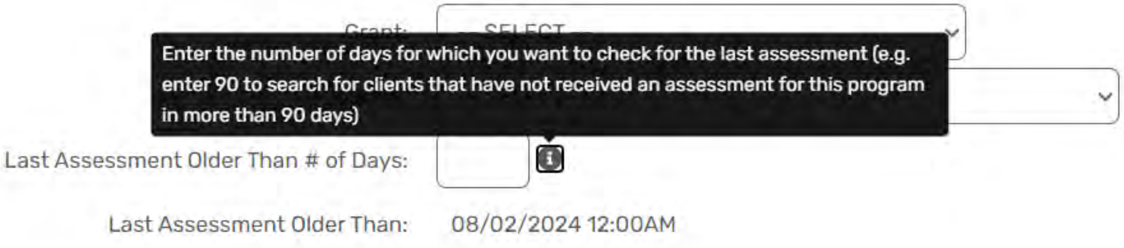
Program: -- SELECT --

Last Assessment Older Than # of Days:

Last Assessment Older Than: 08/02/2024 12:00AM

Displaying 1-200 of 1,465 results.

Figure 3-17 – Current Enrollments with Most Recent Assessment – Days Search Critieria



Enter the number of days for which you want to check for the last assessment (e.g. enter 90 to search for clients that have not received an assessment for this program in more than 90 days)

Last Assessment Older Than # of Days:

Last Assessment Older Than: 08/02/2024 12:00AM

Figure 3-18 - Current Enrollments with Most Recent Assessment – Days Search Critieria Information

Step 5: Click "Search" button. Open enrollments in the program selected will populate, including some statistics such as VISPDAT Score Total, Enroll Date, Number of Days Enrolled, and Case Members (number of family members enrolled in that program).

My User Configuration: Subfolder

"My user Configuration" is a folder and subfolders of viewable and updateable user's profile information as well as an option to update/change login passwords.

Steps to Navigate to the "My User Configuration" Folder Menu

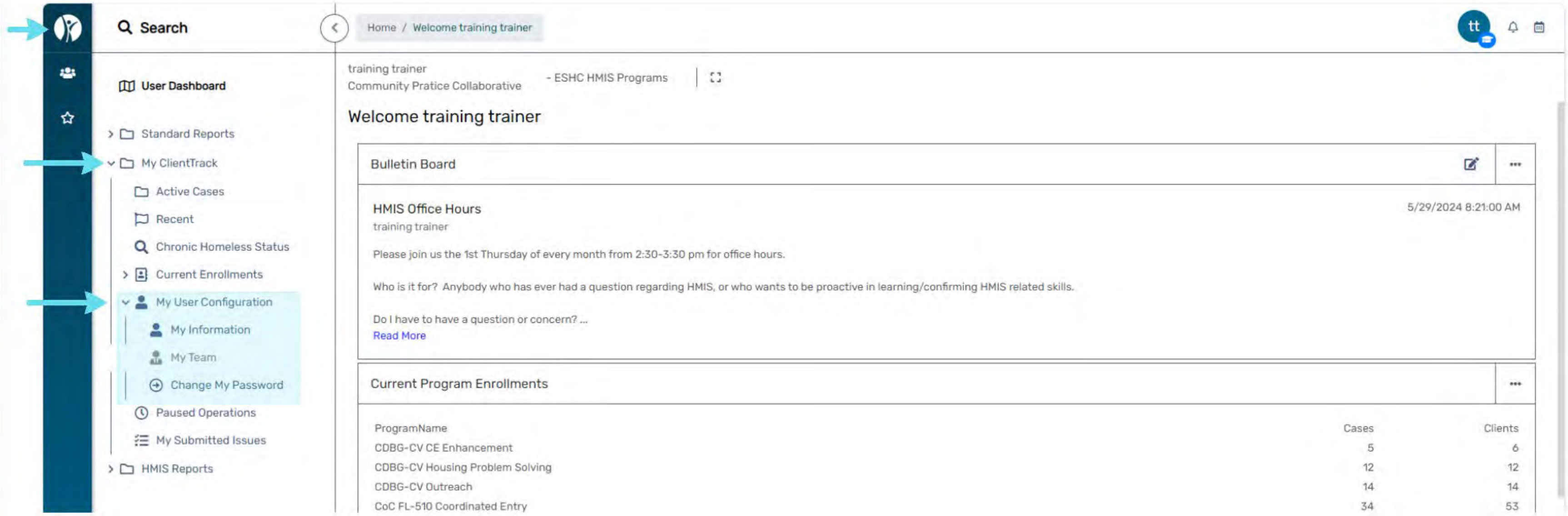
Step 1: Navigate to the Home Workspace*.

**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 "My ClientTrack" secondary sidebar* menu option. A dropdown menu will appear under the "My ClientTrack" folder.

**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".*

Step 3: Select "My User Configuration" secondary sidebar menu option. A dropdown menu will appear under the "My User Configuration" subfolder.



Welcome training trainer

Bulletin Board

HMIS Office Hours
training trainer
5/29/2024 8:21:00 AM

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...
Read More

Current Program Enrollments

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	34	53

Figure 3-19 – My User Configuration

My User Configuration- My Information: Subfolder

“My Information” is a subfolder of “My User Configuration”. This subfolder has viewable and updateable user’s profile information, such as, but not limited to, “Name” and “email address”.

Steps to Navigate to/Edit “My User Information” in the “My information” Folder Menu

Step 1: Navigate to the Home 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 “My ClientTrack” secondary sidebar* menu option. A dropdown menu will appear under the “My ClientTrack” folder.

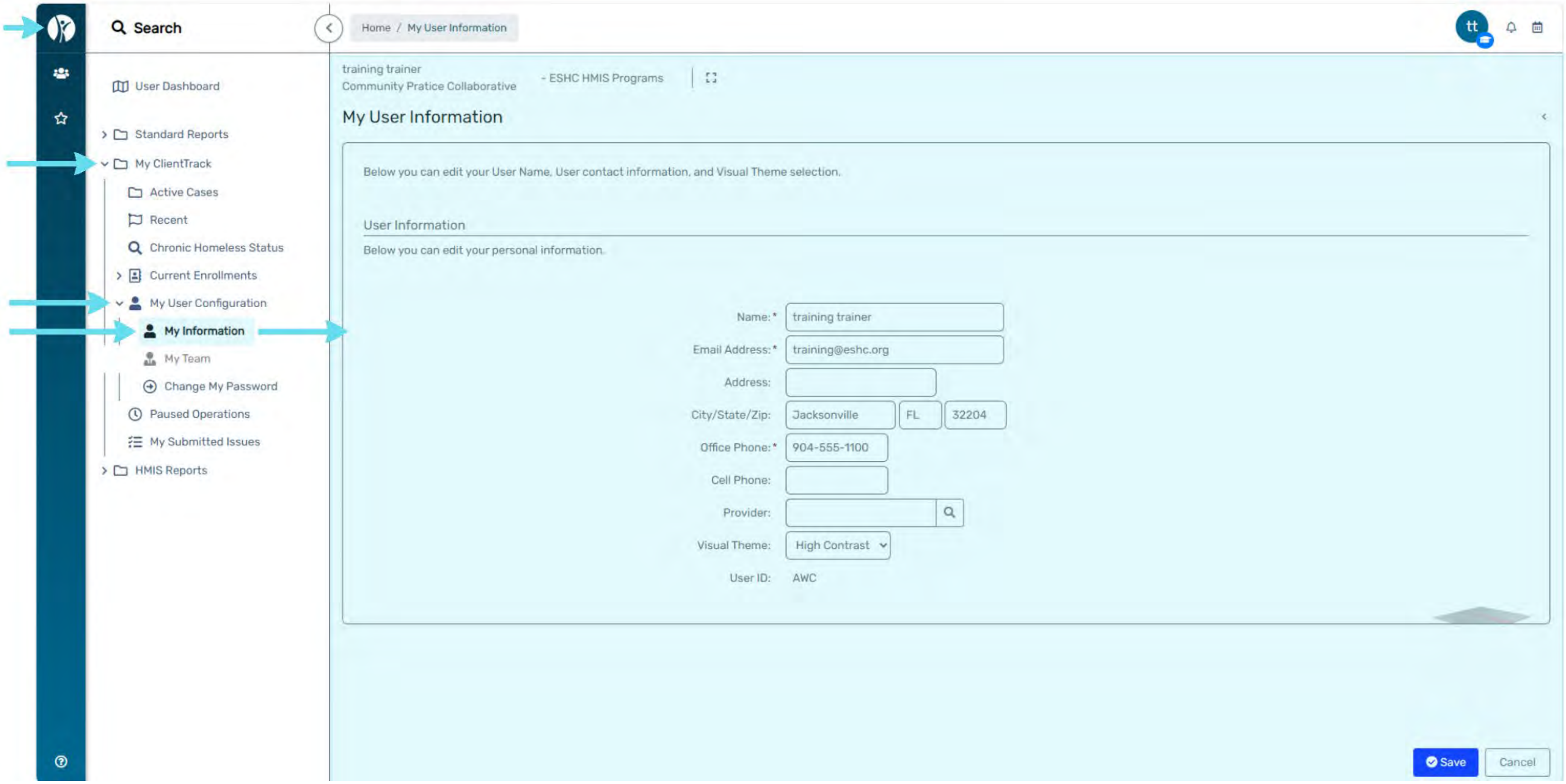
**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

Step 3: Select the “My User Configuration” secondary sidebar menu option. A dropdown menu will appear under the “My User Configuration” subfolder.

Step 4: Select the “My Information” secondary sidebar menu option. ClientTrack will navigate to the “My User Information” workspace container. If no changes are intended to be made, click the “Cancel” button, and ClientTrack will navigate to the “Client Dashboard” workspace container. For instructions on how to make changes, continue to Step 5.

Step 5: Make any applicable changes. Required elements are marked with a (*).

Step 6: Click the “Save” button to save changes. A pop-out window will appear confirming the successful save. Click “OK”.   Click the “Cancel” button to exit without saving. Whether the “OK” or “Cancel” button is selected, ClientTrack will navigate to “Client Dashboard” workspace container.



training trainer
Community Pratice Collaborative - ESHC HMIS Programs

My User Information

Below you can edit your User Name, User contact information, and Visual Theme selection.

User Information

Below you can edit your personal information.

Name:* training trainer
Email Address:* training@eshc.org
Address:
City/State/Zip: Jacksonville FL 32204
Office Phone:* 904-555-1100
Cell Phone:
Provider:
Visual Theme: High Contrast
User ID: AWC

Figure 3-20 – My Information

My User Configuration- My Team: Subfolder

The “My Team” subfolder is a tool for supervisors to manage appropriate HMIS team members. For more information on the “My Team” subfolder, please reach out to your supervisor or email hmis@changinghomelessness.org.

My User Configuration- **Change My Password**: Subfolder

“Change My Password” is a subfolder of “My User Configuration”. This subfolder has viewable and updateable user’s security information.

Steps to Navigate to the “Change My Password” Folder Menu

Step 1: Navigate to the Home 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: Navigate to “My ClientTrack” secondary sidebar* menu option. A dropdown menu will appear under the “My ClientTrack” folder.

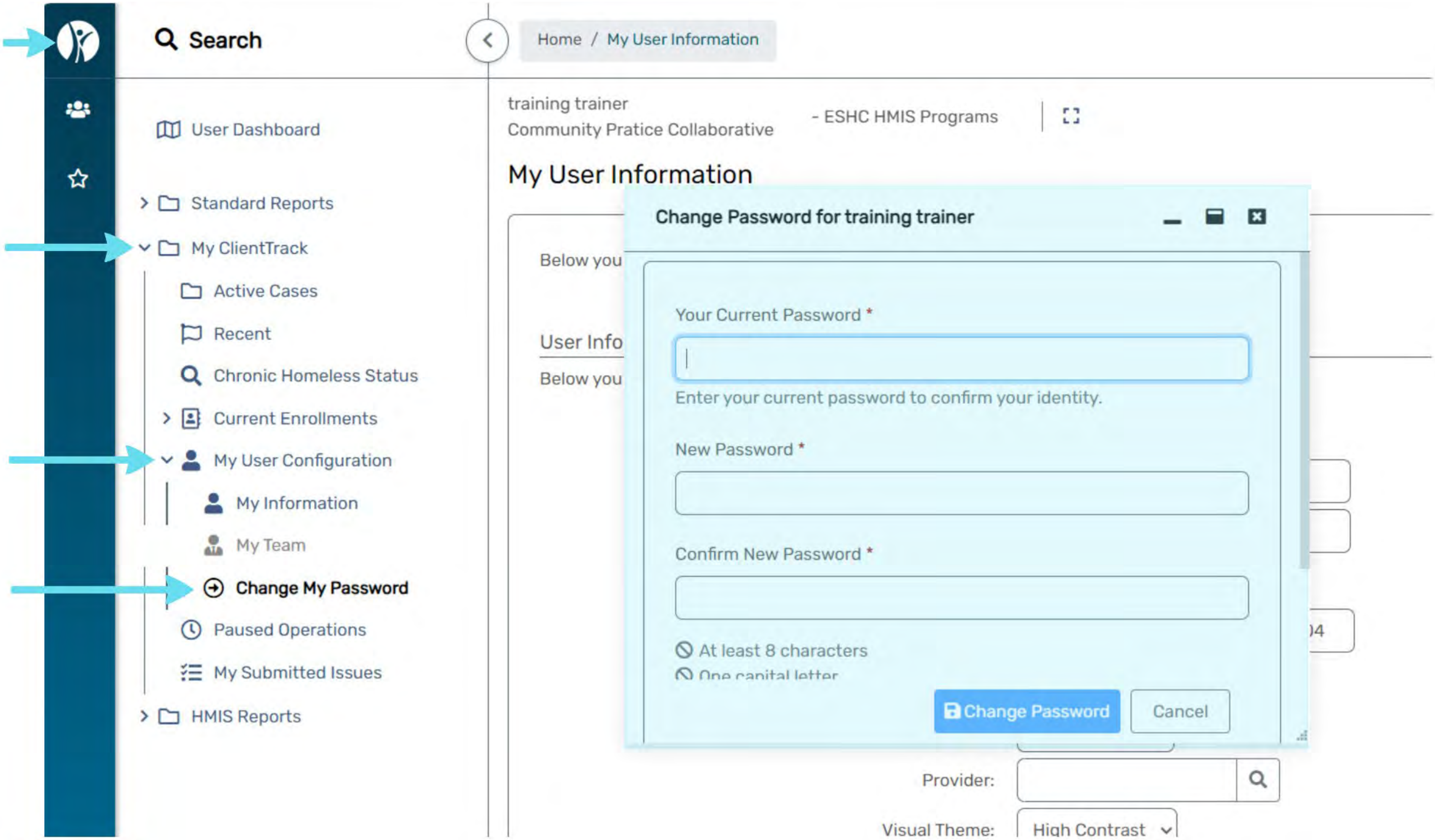
**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

Step 3: Select the “My User Configuration” secondary sidebar menu option. A dropdown menu will appear under the “My User Configuration” subfolder.

Step 4: Select “Change My Password” secondary sidebar menu option. A pop-up window will appear.

Step 5: Type in your current password into the “Your Current password” box. Type in a new password in the “New Password” box. Confirm the “New Password” entry by typing it identically in the “Confirm New Password” box. Required elements are marked with a (*).

Step 6: Click the “Change Password” button to save changes. Select the “Cancel” button to exit without saving.



training trainer
Community Pratice Collaborative - ESHC HMIS Programs

Enter your current password to confirm your identity.

At least 8 characters
One capital letter

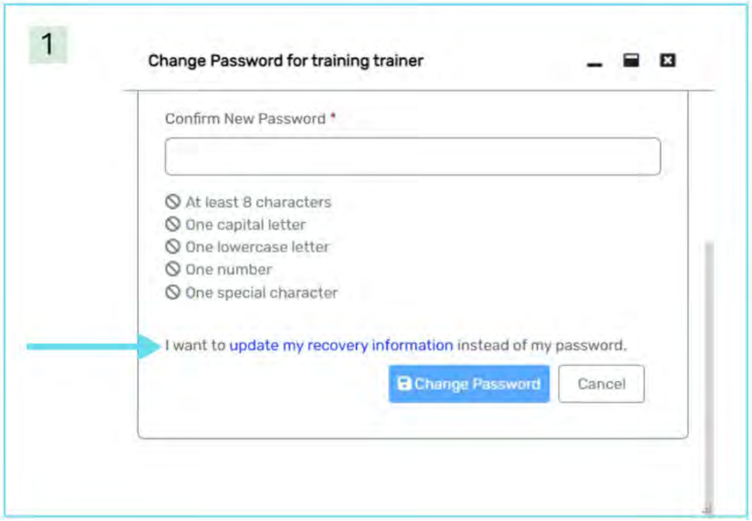
Visual Theme: High Contrast

Figure 3-21 – Change My Password

Tips and Tricks - *Updating Security Information*

Did you know?
- There is more than one way to update password/recovery information.

Method 1 - Via "My ClientTrack" - "My User Configuation" menu



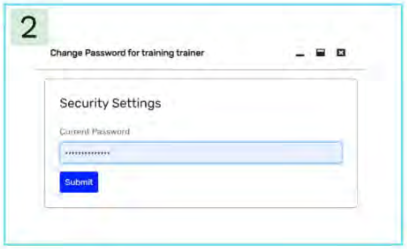
1

Change Password for training trainer

Confirm New Password *

- ⃠ At least 8 characters
- ⃠ One capital letter
- ⃠ One lowercase letter
- ⃠ One number
- ⃠ One special character

I want to update my recovery information instead of my password.



2

Change Password for training trainer

Security Settings

Current Password: **************

3

Change Password for training trainer

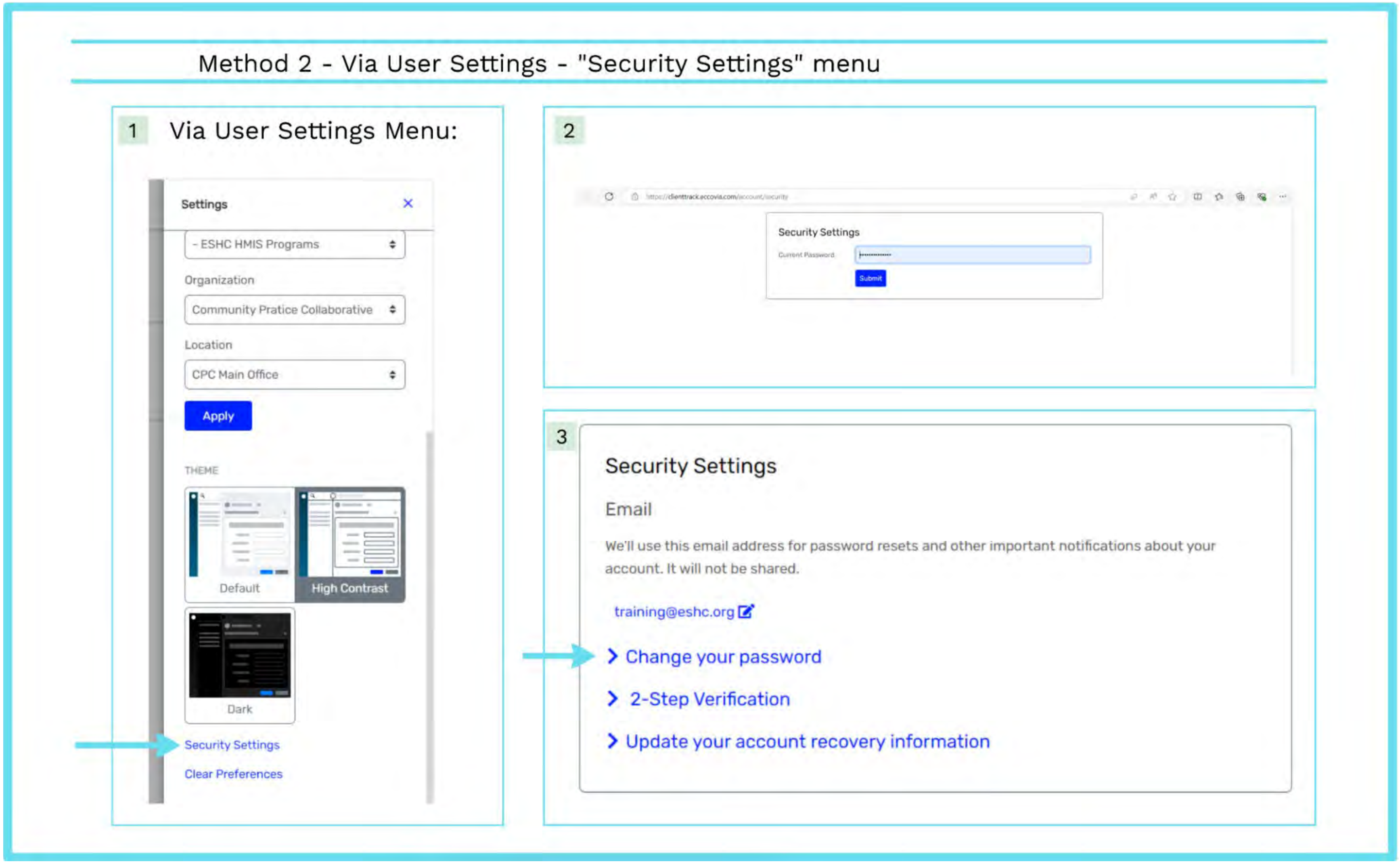
Security Settings

Email

We'll use this email address for password resets and other important notifications about your account. It will not be shared.

training@eshc.org

Figure 3-22 – Tips and Tricks – Updating Security Information 1



Method 2 - Via User Settings - "Security Settings" menu

1 Via User Settings Menu:

Settings

- ESHC HMIS Programs

Organization: Community Pratice Collaborative

Location: CPC Main Office

2

Security Settings

Current Password

3

Security Settings

Email

We'll use this email address for password resets and other important notifications about your account. It will not be shared.

training@eshc.org

Figure 3-23 - Tips and Tricks – Updating Security Information 2

Paused Operations: Subfolder

This menu option allows you to see which operations (Workflows) you have paused. Errors occur easily when a new Workflow is started when an existing paused Workflow for that client exists.

To learn more about Pausing a workflow, refer to - Chapter 5: Basics of Entering Data into ClientTrack/*Pausing a Workflow*

Steps to Navigate to the "Paused Operations" Subfolder Menu

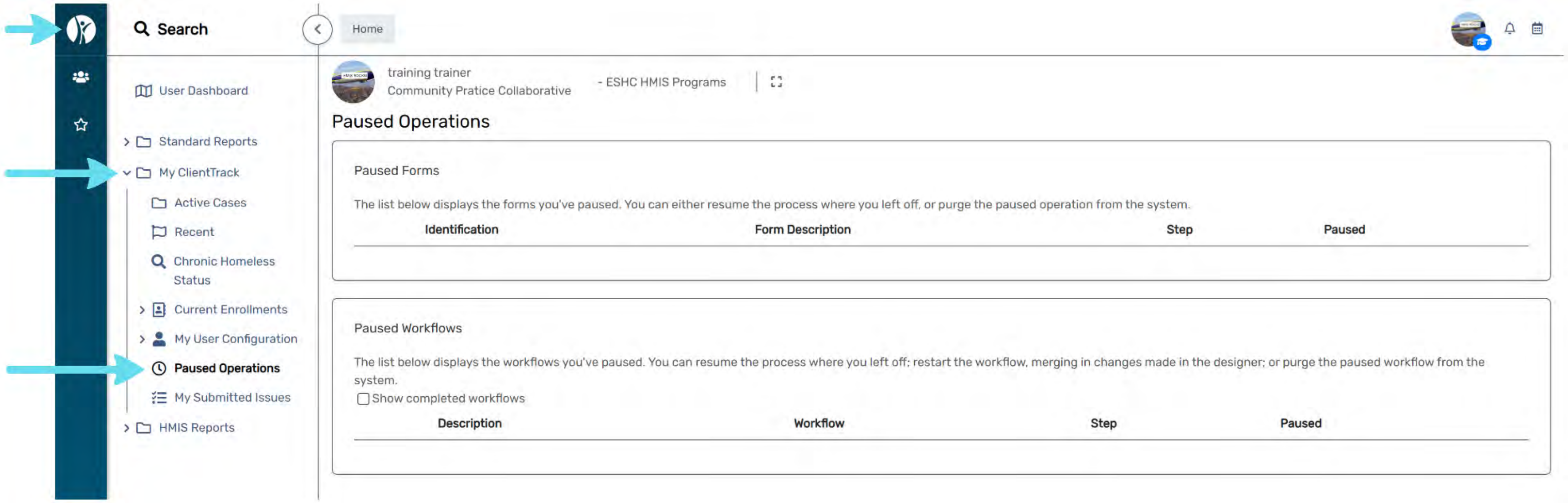
Step 1: Navigate to the Home Workspace*.

**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 "My ClientTrack" secondary sidebar* menu option. A dropdown menu will appear under the "My ClientTrack" folder.

**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".*

Step 3: Select "Paused Operations" secondary sidebar menu option. ClientTrack will navigate to the "Paused Operations" workspace container.



Paused Operations

Paused Forms

The list below displays the forms you've paused. You can either resume the process where you left off, or purge the paused operation from the system.

Identification	Form Description	Step	Paused

Paused Workflows

The list below displays the workflows you've paused. You can resume the process where you left off; restart the workflow, merging in changes made in the designer; or purge the paused workflow from the system.

☐ Show completed workflows

Description	Workflow	Step	Paused

Figure 3-24 – Paused Operations

My Submitted Issues: Subfolder

The “My Submitted Issues” section allows you to view all submitted tickets* that have been sent to the HMIS System Administrators. In addition to receiving e-mails from ClientTrack that include any updates from the System Administrators on addressing your Issue Ticket, you can track how your issue is being addressed using this menu option.

**See Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Help Center for information on how to submit requests in HMIS)*

Steps to Navigate to the “My Submitted Issues” Subfolder Menu and Respond to Existing Tickets

If the HMIS System Administration Team needs further clarification on an Issue Ticket, a user may need to view or respond to what the HMIS Systems Team has updated on the Issue Ticket. Use the "My Submitted Issues" function to respond to these updates.

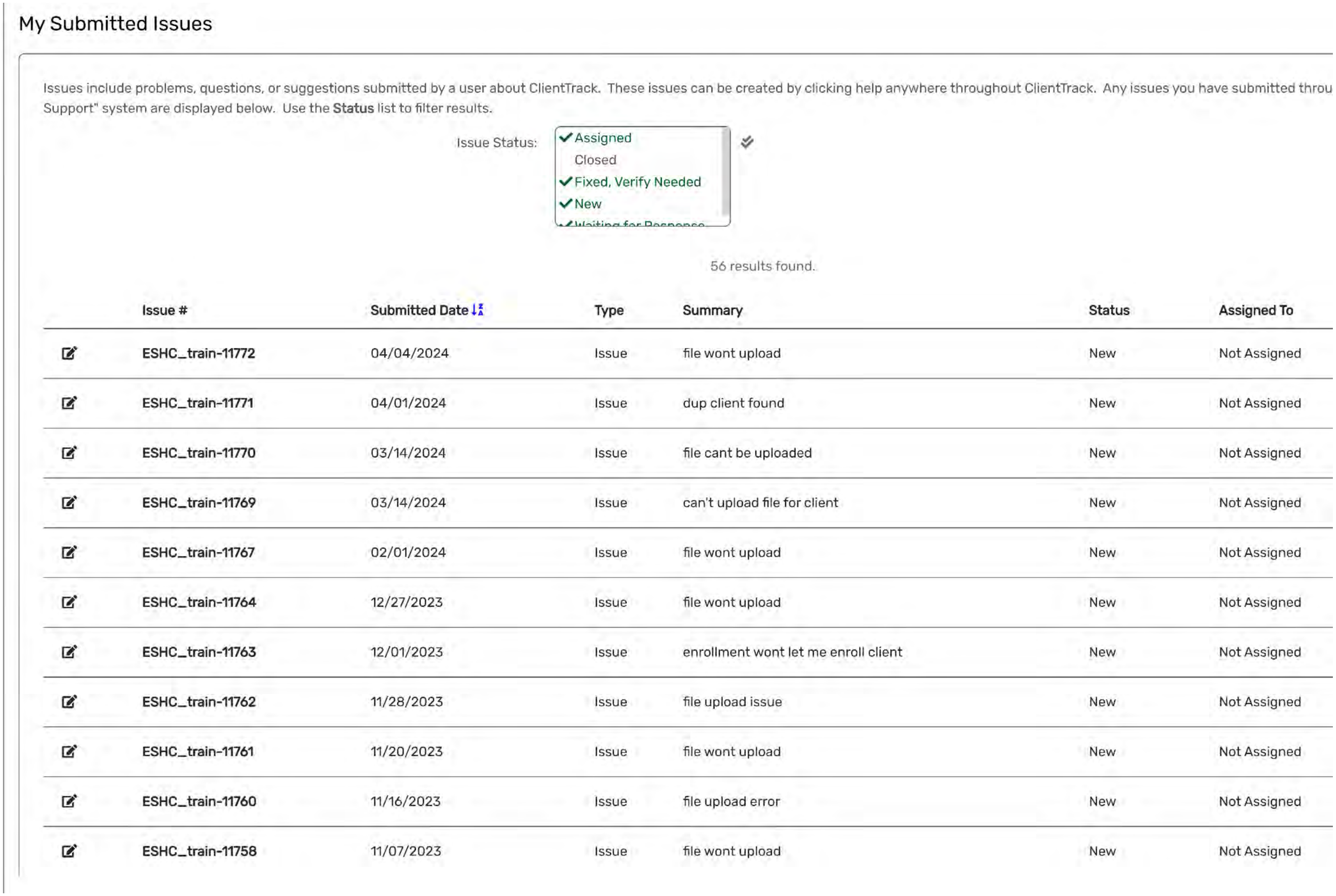
Step 1: Navigate to the Home Workspace*.

**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 "My ClientTrack" secondary sidebar* menu option. A dropdown menu will appear under the "My ClientTrack" folder.

**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".*

Step 3: Select the "My Submitted Issues" secondary sidebar menu option. ClientTrack will navigate to the "My Submitted Issues" workspace container. This will display unresolved issues.



My Submitted Issues

Issues include problems, questions, or suggestions submitted by a user about ClientTrack. These issues can be created by clicking help anywhere throughout ClientTrack. Any issues you have submitted throu
Support" system are displayed below. Use the **Status** list to filter results.

Issue Status:
- ✓ Assigned
- Closed
- ✓ Fixed, Verify Needed
- ✓ New
- ✓ Waiting for Response

56 results found.

	Issue #	Submitted Date	Type	Summary	Status	Assigned To
✎	**ESHC_train-11772**	04/04/2024	Issue	file wont upload	New	Not Assigned
✎	**ESHC_train-11771**	04/01/2024	Issue	dup client found	New	Not Assigned
✎	**ESHC_train-11770**	03/14/2024	Issue	file cant be uploaded	New	Not Assigned
✎	**ESHC_train-11769**	03/14/2024	Issue	can't upload file for client	New	Not Assigned
✎	**ESHC_train-11767**	02/01/2024	Issue	file wont upload	New	Not Assigned
✎	**ESHC_train-11764**	12/27/2023	Issue	file wont upload	New	Not Assigned
✎	**ESHC_train-11763**	12/01/2023	Issue	enrollment wont let me enroll client	New	Not Assigned
✎	**ESHC_train-11762**	11/28/2023	Issue	file upload issue	New	Not Assigned
✎	**ESHC_train-11761**	11/20/2023	Issue	file wont upload	New	Not Assigned
✎	**ESHC_train-11760**	11/16/2023	Issue	file upload error	New	Not Assigned
✎	**ESHC_train-11758**	11/07/2023	Issue	file wont upload	New	Not Assigned

Figure 3-25 – My Submitted Issues

Step 3: To view all submitted tickets, select all filters in the “Issue Status” box. All Issue Tickets submitted will display. It will also display which HMIS team member has been assigned the Issue Ticket.

Step 4: To view any information updated by the System Administrators, click the edit icon* next to the applicable issue ticket. This will show details from the Issue Ticket such as who addressed it, follow-up notes on how it was addressed, and if it was closed. To respond to an existing ticket, continue to Step 5.

**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”.*

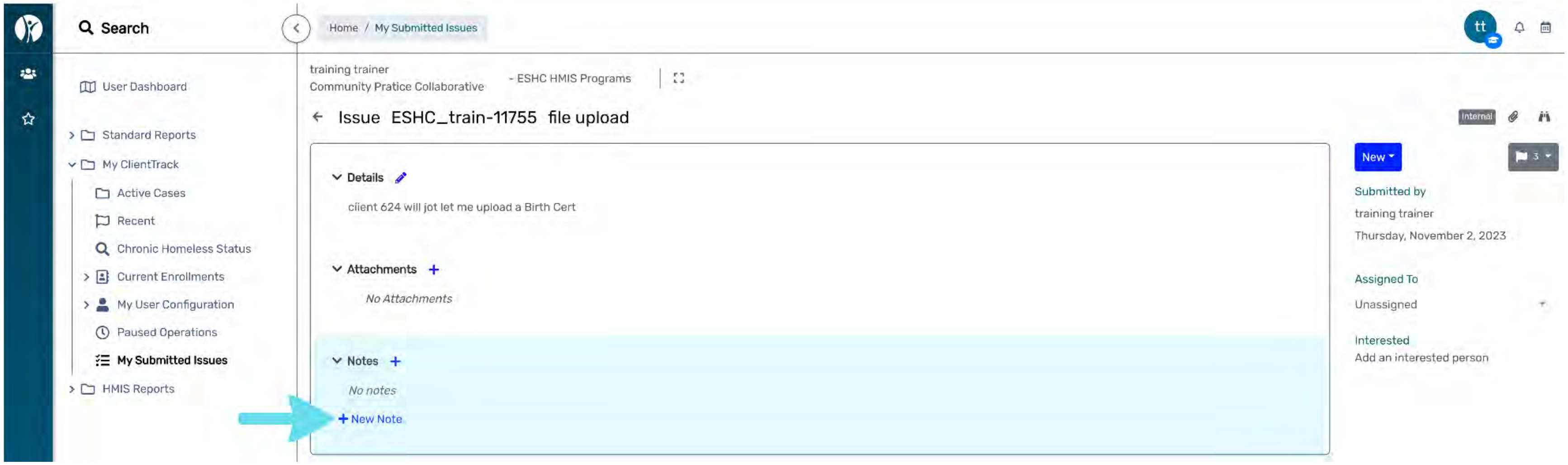
Click here to edit/view issue

56 results found.

Issue #	Submitted Date	Type	Summary	Status	Assigned To
ESHC_train-11772	04/04/2024	Issue	file wont upload	New	Not Assigned
ESHC_train-11771	04/01/2024	Issue	dup client found	New	Not Assigned
ESHC_train-11770	03/14/2024	Issue	file cant be uploaded	New	Not Assigned

Figure 3-26 – My Submitted Issues – View and Edit

Step 5: Click on “New Note” at the bottom left of the Issue Ticket workspace container.



training trainer
Community Pratice Collaborative - ESHC HMIS Programs

Issue ESHC_train-11755 file upload

Details: client 624 will jot let me upload a Birth Cert

Attachments: No Attachments

Notes: No notes

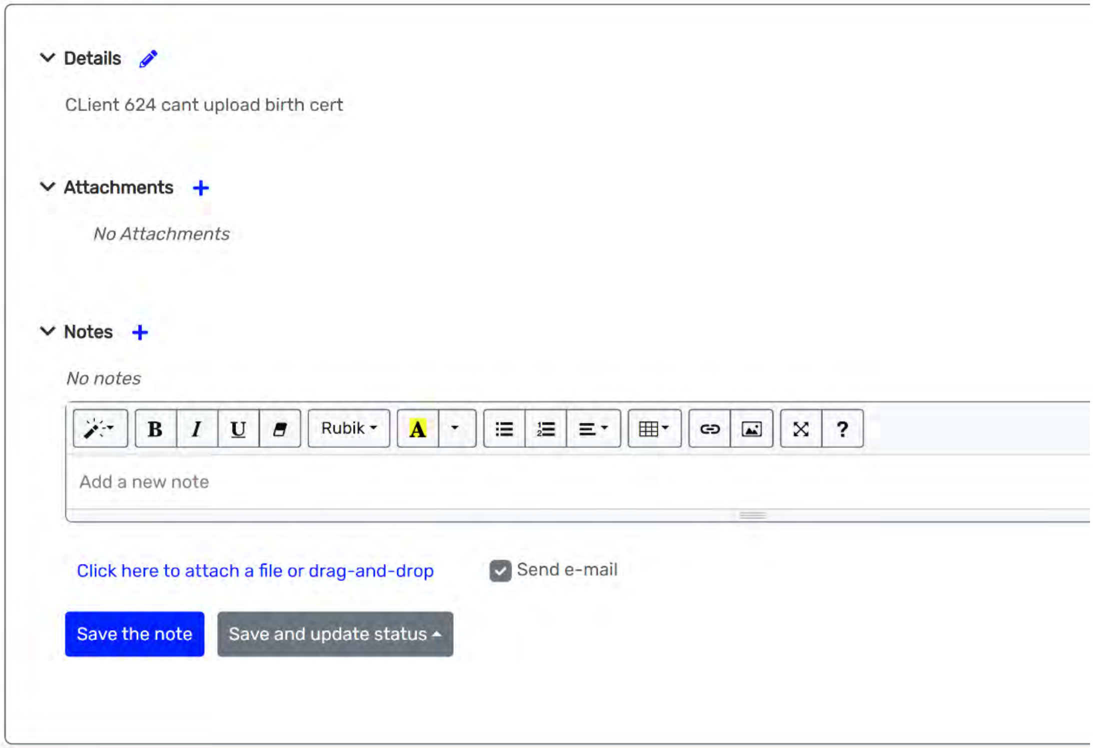
Submitted by: training trainer, Thursday, November 2, 2023

Assigned To: Unassigned

Interested: Add an interested person

Figure 3-27 – Adding a new note in My Submitted Issues

Step 8: Type note into the “Add a new note” text box.



CLient 624 cant upload birth cert

No Attachments

No notes

Figure 3-28 – Add a new note text box

Step 9: Click the “Save the note” button. This will notify the HMIS Systems Team that the Issue Ticket has been responded to via e-mail alert.

HMIS Reports: Folder

HMIS Reports allows users to run basic HMIS reports regarding a variety of data elements. HMIS Reports training, as well as Standard reports training, is offered to users on an individual basis requested by the user/supervisor. To request a reports training, reach out to hmis@changinghomelessness.org for more information.

Tutorials on how to run various HMIS reports can be found at chiedconnect.net in the "Reports" course found in the Self-Enroll Courses section. For more information on how to register for chiedconnect.net as well as other online resources, go to Introduction/Online Resources in the "HMIS Basic User 2025 Manual"

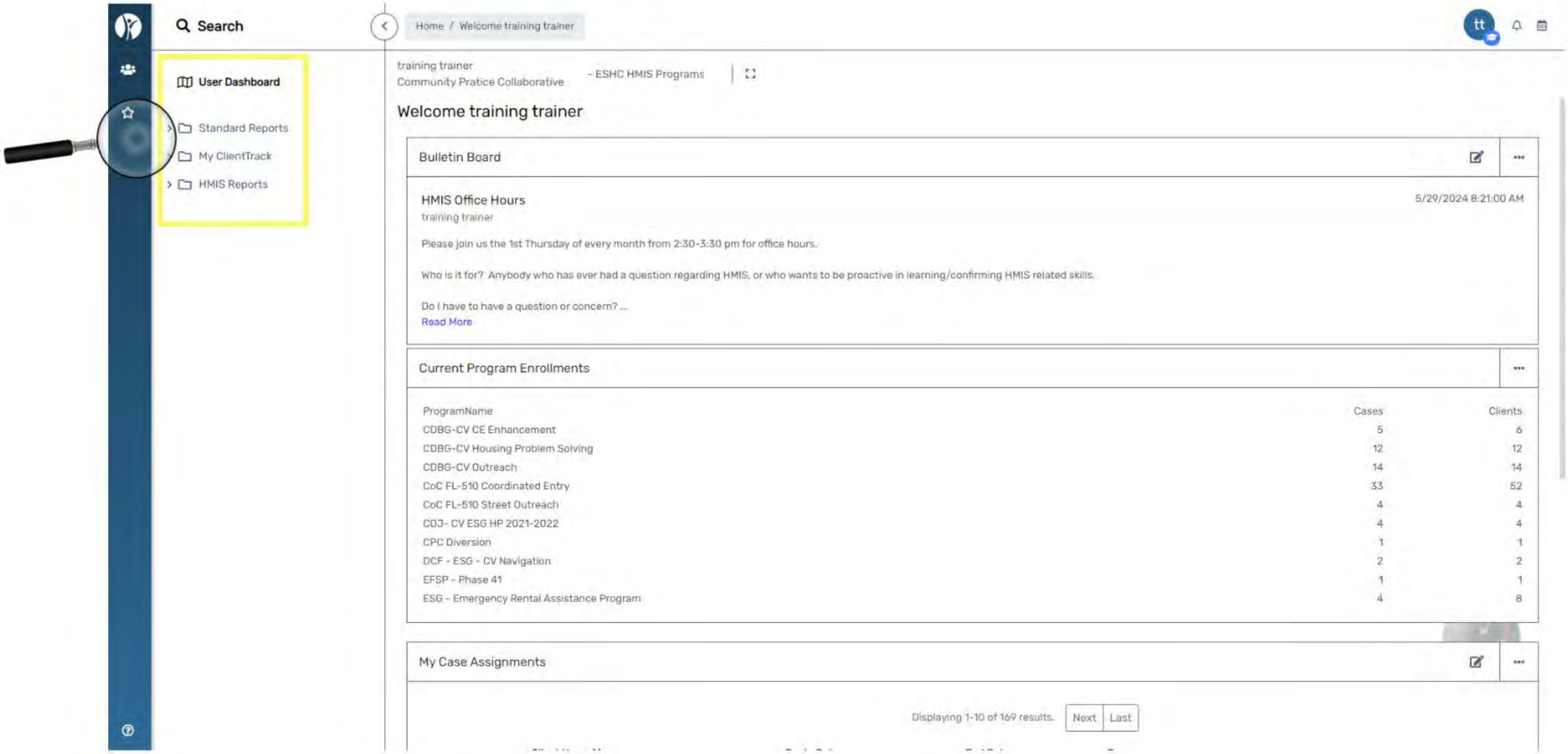
HMIS
How-To Tutorials

For Self-Enroll online reports training on Moodle, scan the QR code

Figure 3-29 – chiedconnect.edu Reports training QR Code

List and Locations of HMIS Reports

- Case Assignment Report
- HUD/HMIS Reports
    - Exports
    - Exports 2024
        - CE APR 2024
        - CSV Caper 2024
        - CSV APR 2024
        - PATH 2024
        - CSV Export 2024
        - APR/CAPER Preview
    - HUD Data Quality Report
    - PATH 2022 Annual Report
    - APR_ESG & DQ Detail Export
    - HMIS Active Client List
- VISPDAT and SPDAT Assessments
    - SPDAT
    - F-SPDAT
    - VISPDAT
    - VI-F-SPDAT
- Files on Server



HMIS Office Hours 5/29/2024 8:21:00 AM

training trainer

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...

Read More

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	33	52
CoC FL-510 Street Outreach	4	4
COJ- CV ESG HP 2021-2022	4	4
CPC Diversion	1	1
DCF - ESG - CV Navigation	2	2
EFSP - Phase 41	1	1
ESG - Emergency Rental Assistance Program	4	8

Displaying 1-10 of 169 results.

Figure 3-30 – HMIS Reports Folder Locations

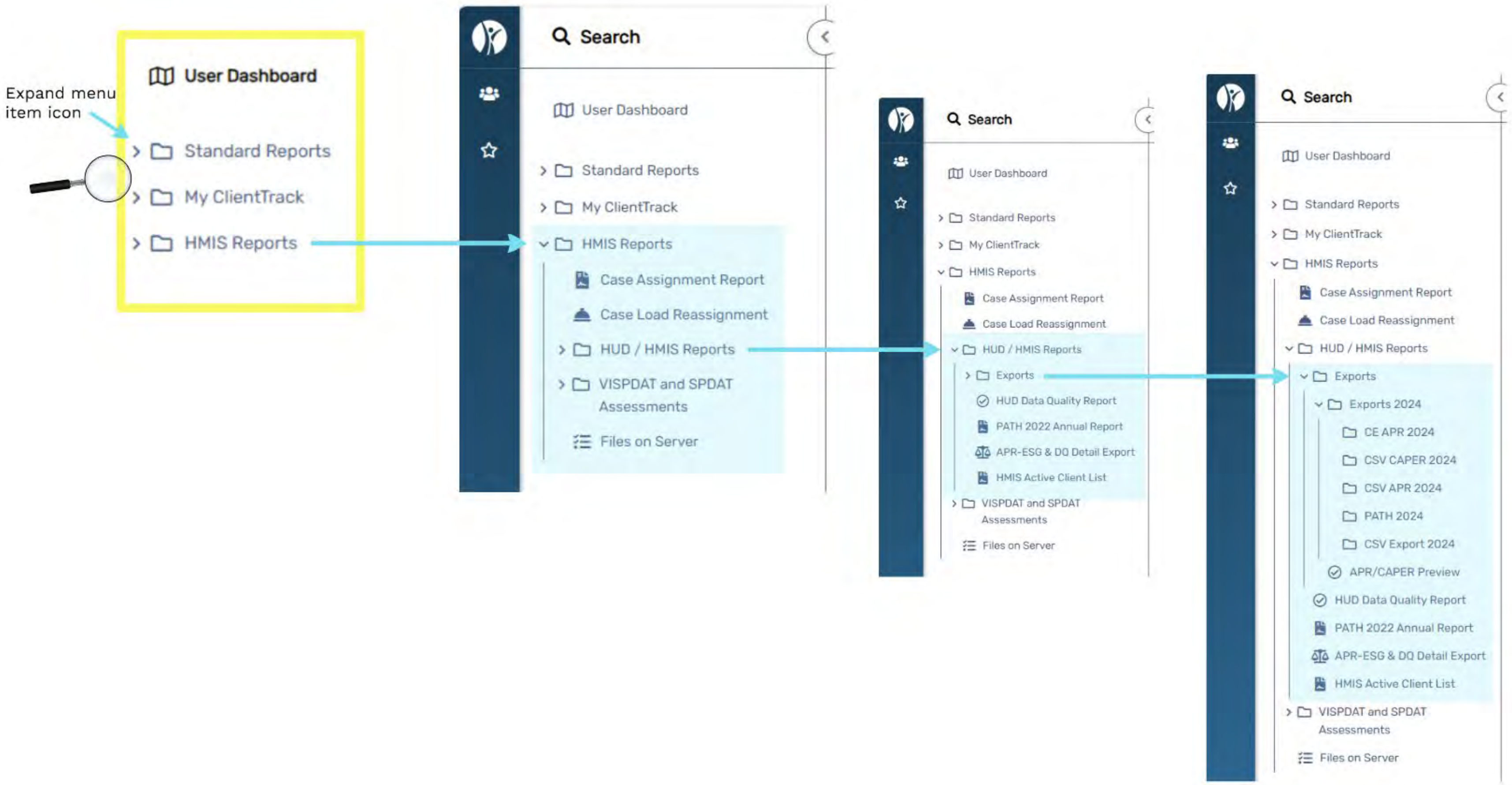


Figure 3-31 – HMIS Reports Folder Locations Dropdown Menu 1 – HUD/HMIS Reports

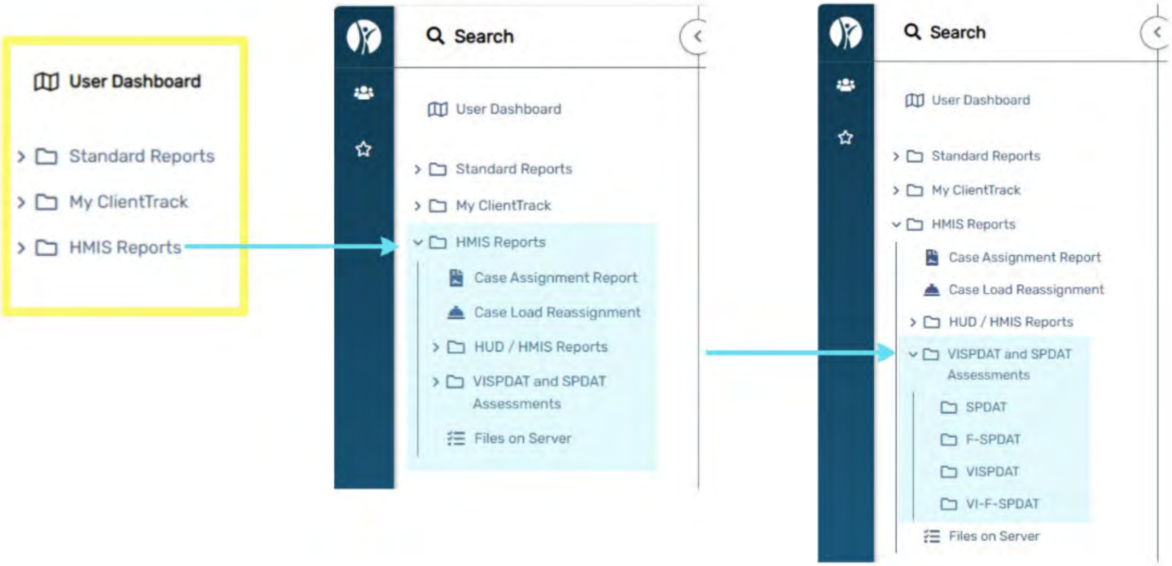


Figure 3-32 – HMIS Reports Folder Locations Dropdown Menu 2 – VISPDAT and SPDAT Assessments

Case Load Reassignment: Subfolder

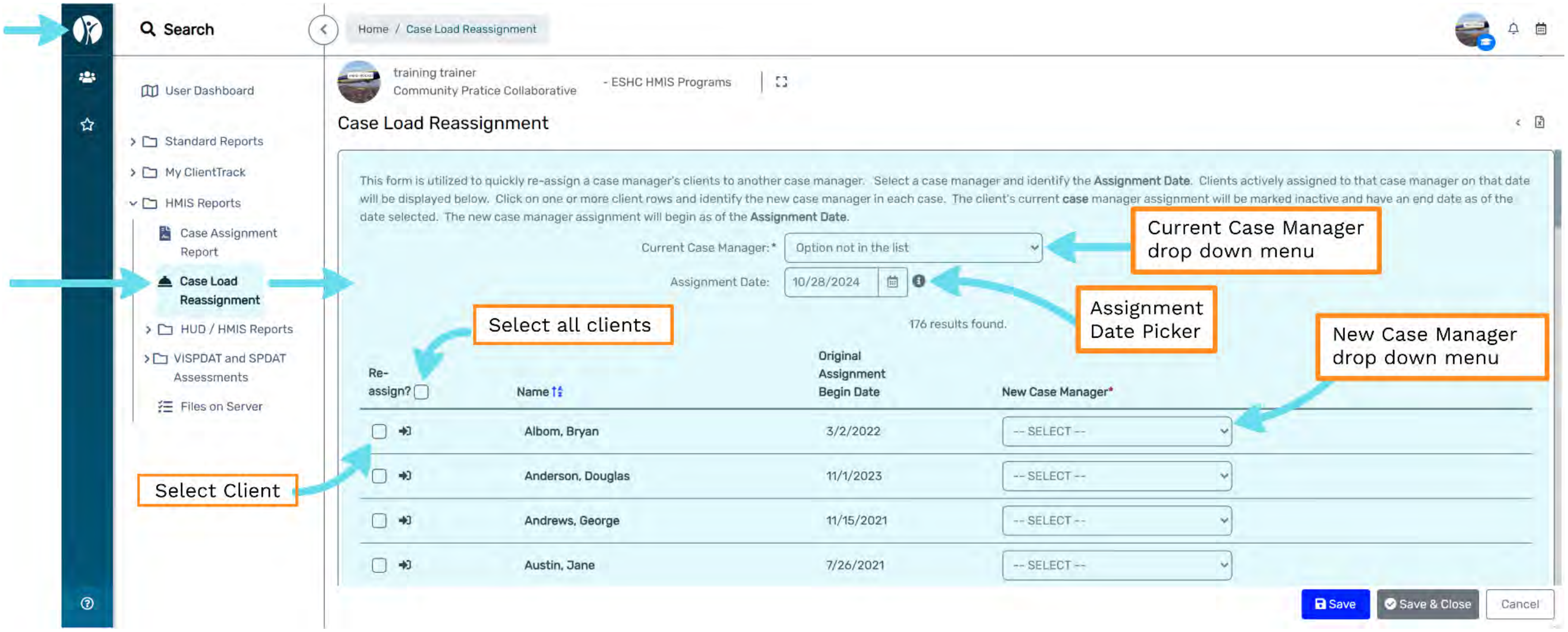
To reassign cases via the “Case Load Reassignment” tool, a user will need access to “HMIS Reports.” To request access, email hmis@changinghomelessness.org.

Step 1: Navigate to the Home 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 "HMIS Reports" folder secondary sidebar* menu option. A dropdown menu will appear under the "HMIS Reports" folder.

**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".*



Case Load Reassignment

This form is utilized to quickly re-assign a case manager's clients to another case manager. Select a case manager and identify the **Assignment Date**. Clients actively assigned to that case manager on that date will be displayed below. Click on one or more client rows and identify the new case manager in each case. The client's current **case** manager assignment will be marked inactive and have an end date as of the date selected. The new case manager assignment will begin as of the **Assignment Date**.

Current Case Manager:* Option not in the list

Assignment Date: 10/28/2024

176 results found.

Re-assign? ☐	Name	Original Assignment Begin Date	New Case Manager*
☐	Albom, Bryan	3/2/2022	-- SELECT --
☐	Anderson, Douglas	11/1/2023	-- SELECT --
☐	Andrews, George	11/15/2021	-- SELECT --
☐	Austin, Jane	7/26/2021	-- SELECT --

Current Case Manager drop down menu

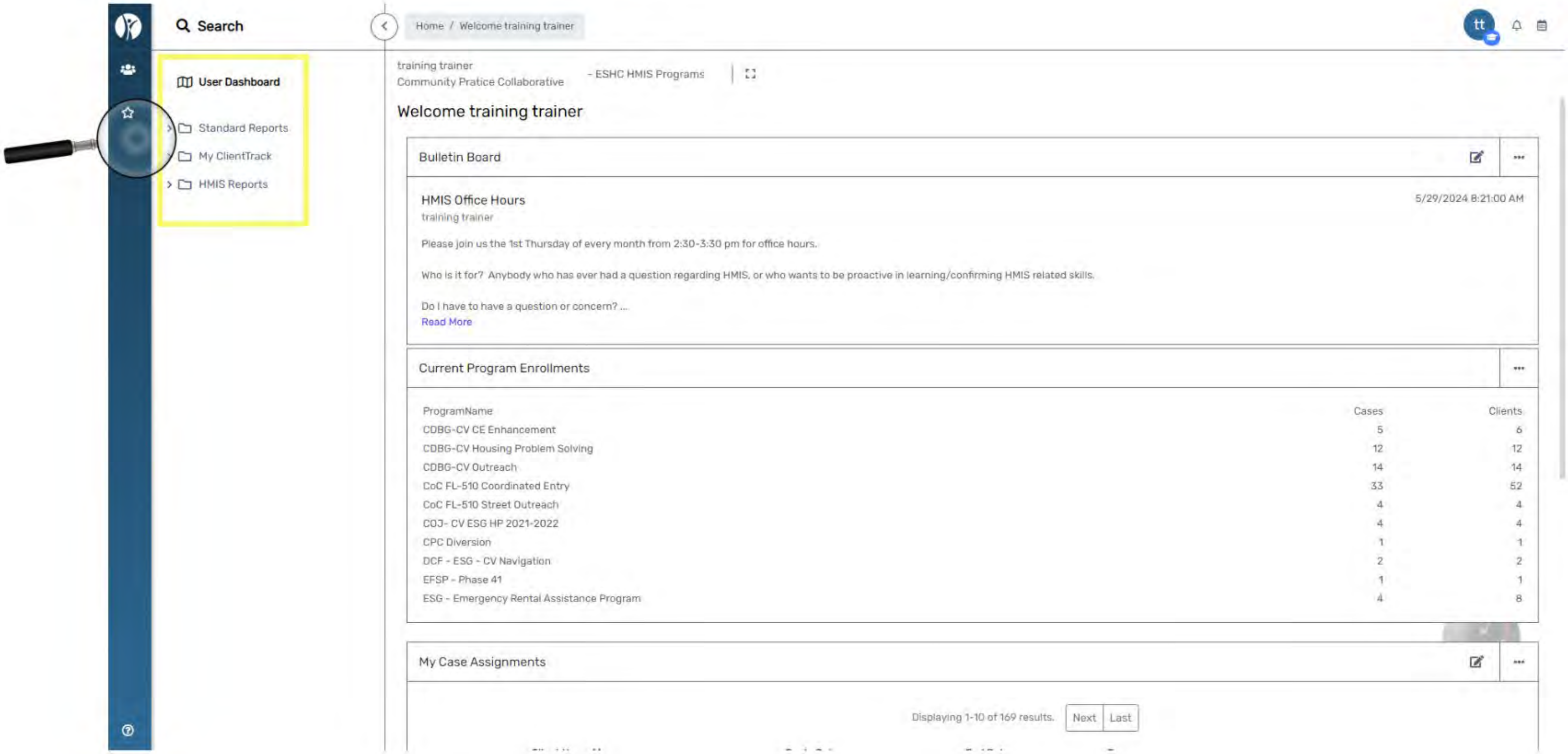
Assignment Date Picker

Select all clients

New Case Manager drop down menu

Select Client

Figure 3-33 – Case Load Reassignment Anatomy



training trainer
Community Pratice Collaborative - ESHC HMIS Programs

Welcome training trainer

Bulletin Board

HMIS Office Hours
training trainer
5/29/2024 8:21:00 AM

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...
Read More

Current Program Enrollments

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	33	52
CoC FL-510 Street Outreach	4	4
COJ- CV ESG HP 2021-2022	4	4
CPC Diversion	1	1
DCF - ESG - CV Navigation	2	2
EFSP - Phase 41	1	1
ESG - Emergency Rental Assistance Program	4	8

My Case Assignments

Displaying 1-10 of 169 results.

Figure 3-34 – Tips and Tricks – Updating Security Information 1

Chapter 4 : Client Workspace: Menu Options, Folders, and Subfolders

This section goes over many of the “Menu Options” available to you while you are in 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”.*

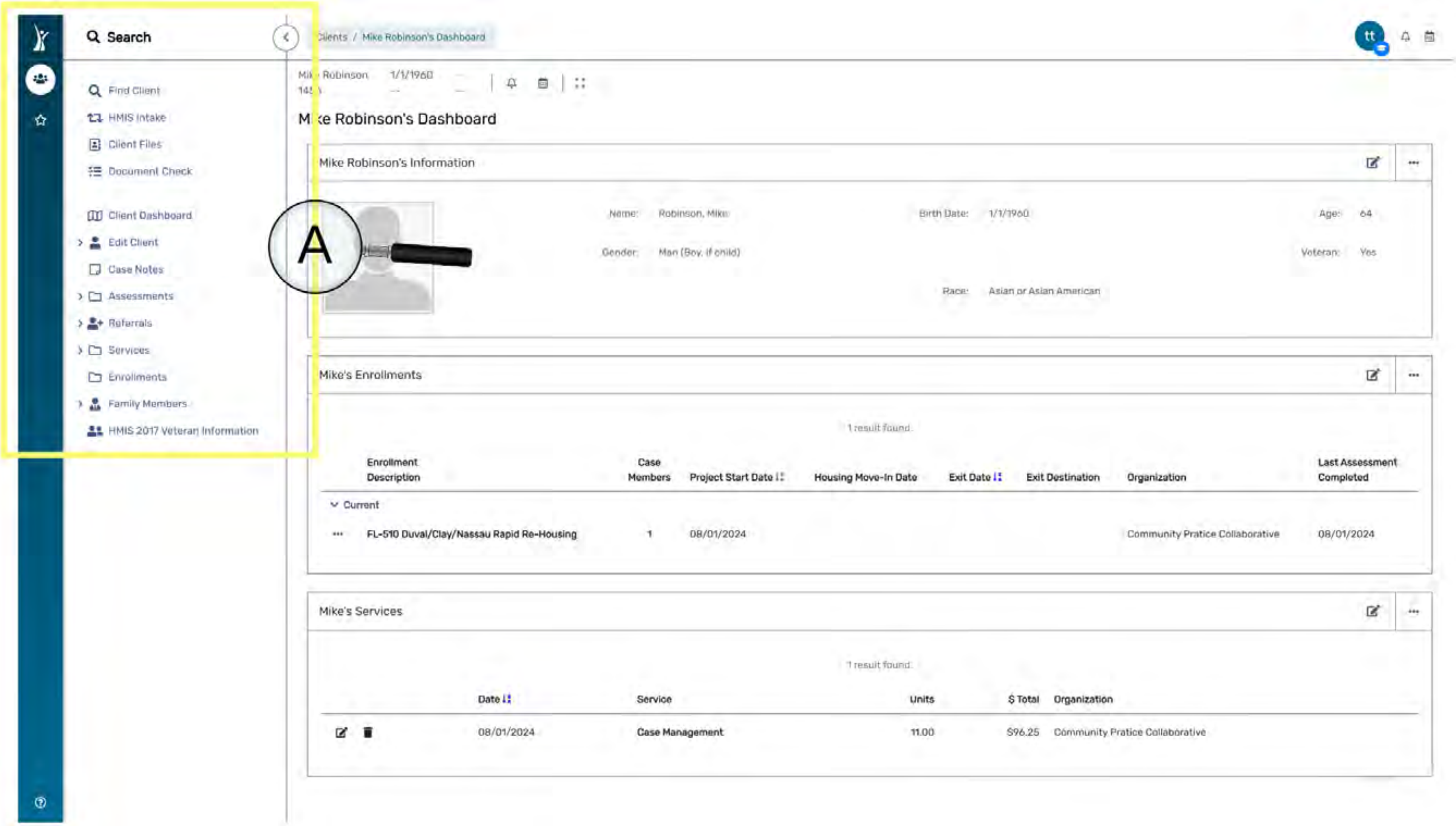
Client Workspace Folders:

- Find Client: Folder
- HMIS Intake: Folder

- Client Dashboard: Folder
- Edit Client: Folder
- Case Notes: Folder
- Assessments: Folder

- Client Files: Folder
- Document Check: Folder

- Referrals: Folder
- Services: Folder
- Enrollments: Folder
- Family Members: Folder



M ke Robinson's Dashboard

Mike Robinson's Information

Name: Robinson, Mike

Birth Date: 1/1/1960

Age: 64

Gender: Man (Boy, if child)

Veteran: Yes

Race: Asian or Asian American

Mike's Enrollments

1 result found

	Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
Current								
•••	FL-510 Duval/Clay/Nassau Rapid Re-Housing	1	08/01/2024				Community Pratice Collaborative	08/01/2024

Mike's Services

1 result found

	Date	Service	Units	$ Total	Organization
	08/01/2024	Case Management	11.00	$96.25	Community Pratice Collaborative

Figure 4-1 – Client Workspace

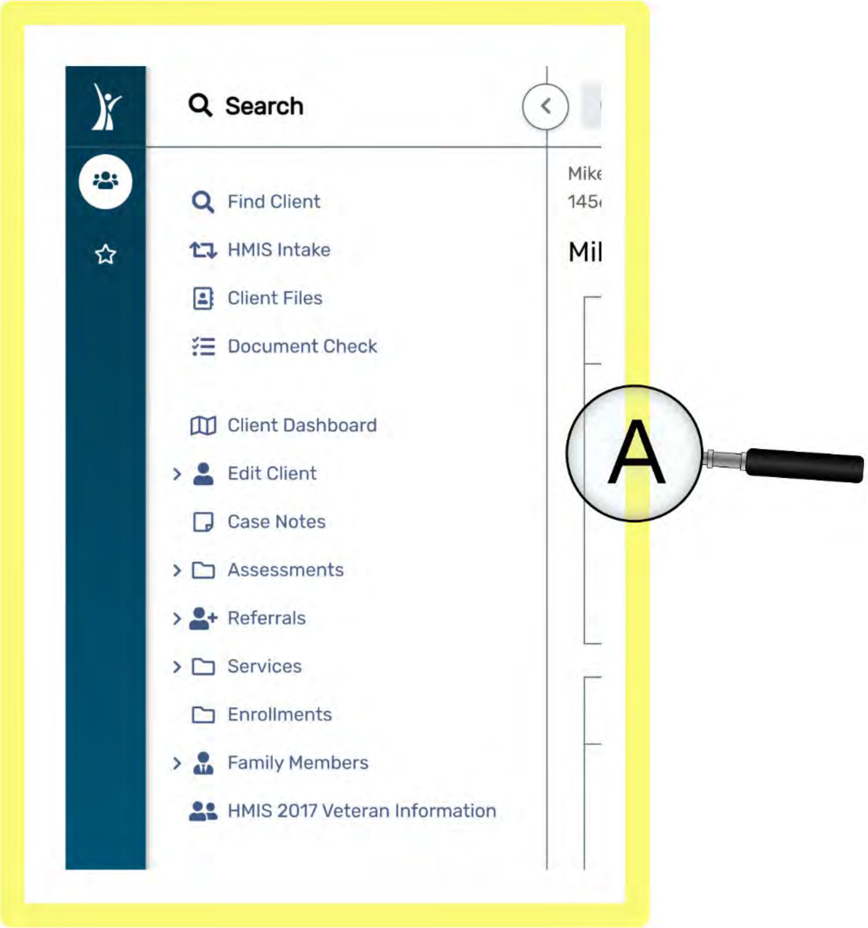


Figure 4-2.a.z - Client Workspace Secondary Sidebar Folders

Find Client: Folder

The “Find Client” menu option in the “Client Workspace” allows users to search for any existing client in the HMIS system. Understanding how to search for a client is extremely important because it is the best way to prevent creating multiple records, also known as duplicates, of individual clients.

Best Practices to Search for Clients in HMIS

**For instructions on the mechanics of how to perform a Find Client search, see Chapter 2: Navigating in ClientTrack/Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Client Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

When searching for a client in ClientTrack/HMIS, follow these simple guidelines to prevent creating multiple records.

Step 1: Cast a wider net than needed. When starting a search, it is better for you to get too many records returned rather than too few. You can always look at the list of potential matches and select the correct record.

- Start by entering the first 2 letters of the client’s first and last. This will ensure that if a record already exists for this client with the name slightly misspelled, the search will return that record.

Step 2: Use all available information available. Any personal identifiable information such as a social security number, a birthday, etc., may be useful information to search for or verify a client’s identity. Search multiple times using different information.

- A client may have had an existing profile in HMIS that has incorrect information such as a misspelled name or incorrect social. Therefore, step 2 can help compliment the search process that started with Step 1. Searching in multiple scenarios, for example, entering simply a first letter of a first and last name, a birthday, and a partial social may locate a previously entered client’s incorrect data. Next, for example, enter the first two letters, no birthday, and a couple of different social digits.
- The effectiveness of a search increases with logical and strategic search criteria. Once an effective search strategy is obtained, searching for and preventing multiple client records is effective and sustainable.

Step 3: Verify information. If a potential record has been found, make sure that other data matches. If any doubt exists, such as missing or inconsistent information, reach out to a supervisor and/or email hmis@changinghomelessness.org to gain assistance on verifying a client's profile.

- HMIS records are confidential as outlined by the rules and regulations. Therefore, if a potential record shows, for example, the client has a daughter, avoid saying, "Do you have a daughter named -------- ?". Instead, ask an open-ended question such as, "Have you had any family or friends associated with you that may already be in our HMIS system?"

Search for Clients Using "Find Client"

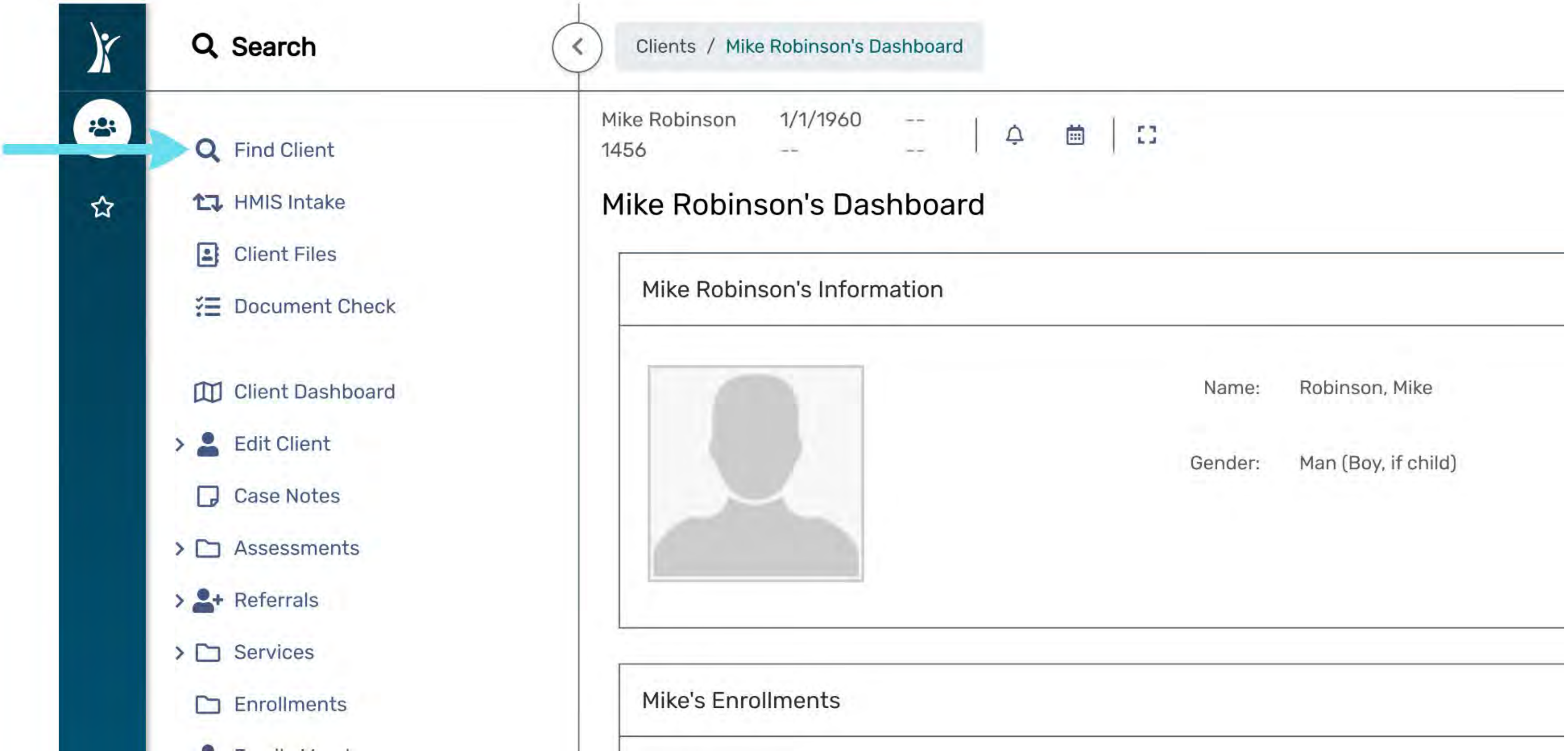
Steps to Navigate to the "Find Client" Folder Menu

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 "Find Client" secondary sidebar* menu option. ClientTrack will navigate to the "Find Client" 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".*



Mike Robinson 1/1/1960 --
1456 -- --

Mike Robinson's Dashboard

Mike Robinson's Information

Name: Robinson, Mike

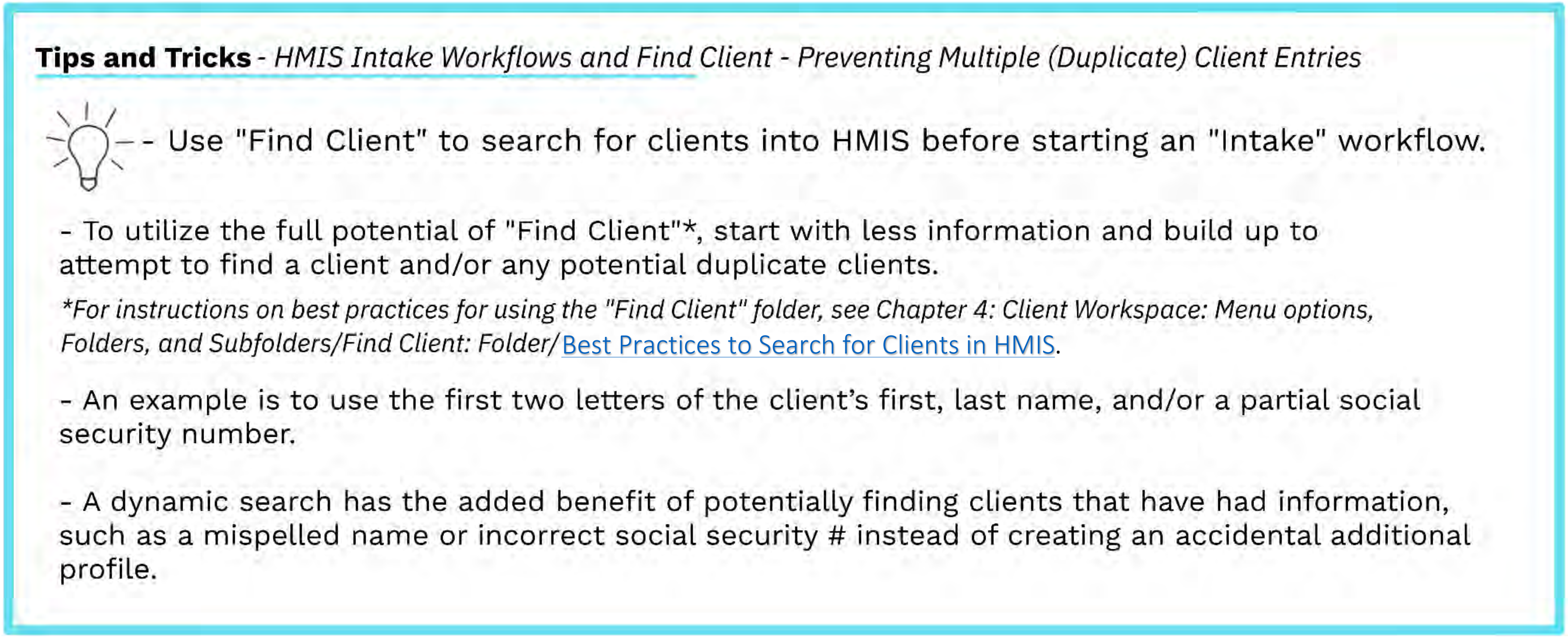
Gender: Man (Boy, if child)

Mike's Enrollments

Figure 4-3 – Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

Figure 4-4 Find Client Form



Tips and Tricks - *HMIS Intake Workflows and Find Client - Preventing Multiple (Duplicate) Client Entries*

- Use "Find Client" to search for clients into HMIS before starting an "Intake" workflow.

- To utilize the full potential of "Find Client"*, start with less information and build up to attempt to find a client and/or any potential duplicate clients.

**For instructions on best practices for using the "Find Client" folder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Best Practices to Search for Clients in HMIS.

- An example is to use the first two letters of the client's first, last name, and/or a partial social security number.

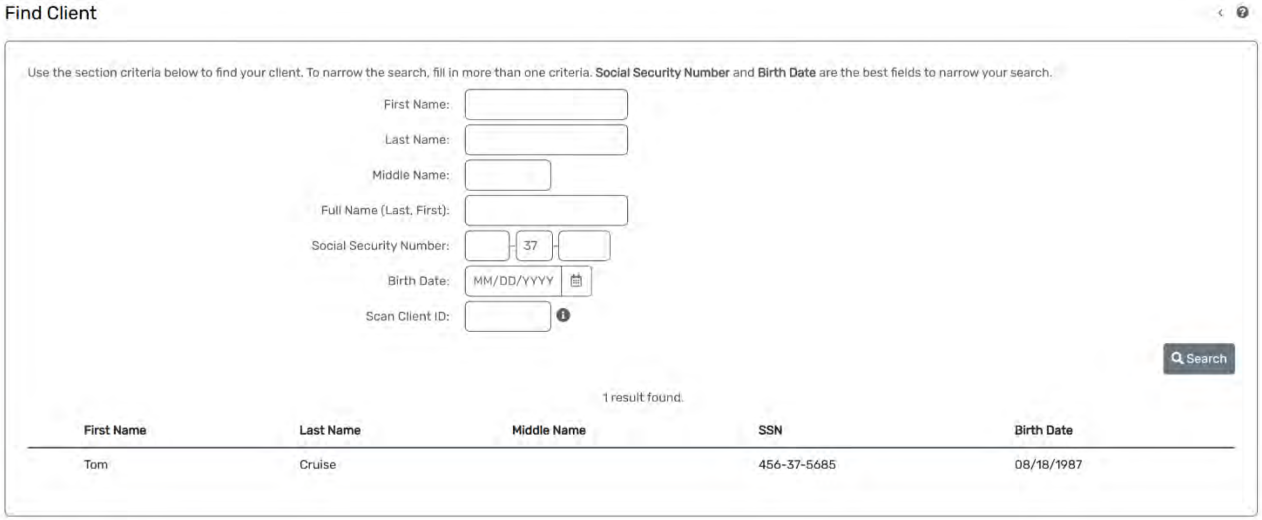
- A dynamic search has the added benefit of potentially finding clients that have had information, such as a mispelled name or incorrect social security # instead of creating an accidental additional profile.

Figure 4-5 – Tips and Tricks – Preventing Multiple Client Entries

Tips and Tricks - *HMIS Intake Workflows and Find Client - Preventing Multiple (Duplicate) Client Entries*

A partial entry can yeild different results depending on the dynamics of the search.

Example #1



Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name:
Last Name:
Middle Name:
Full Name (Last, First):
Social Security Number: ___ - 37 - ___
Birth Date: MM/DD/YYYY
Scan Client ID:

1 result found.

First Name	Last Name	Middle Name	SSN	Birth Date
Tom	Cruise		456-37-5685	08/18/1987

Example #2

Social Security Number: ___ - ___ - 37
Birth Date: MM/DD/YYYY
Scan Client ID:

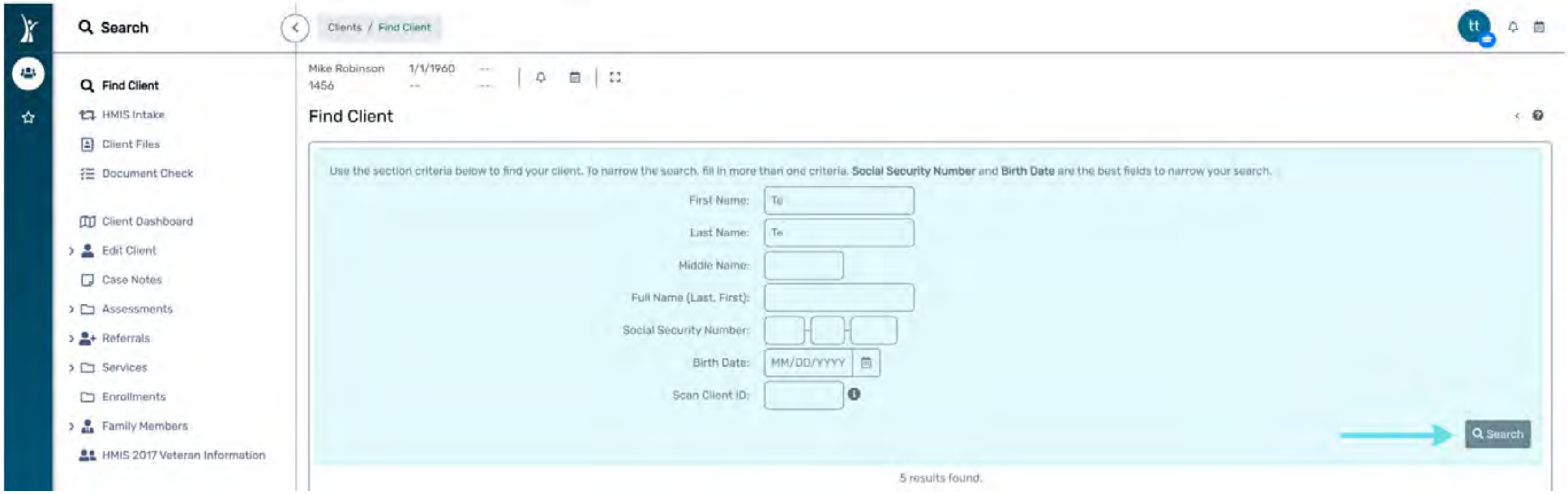
2 results found.

First Name	Last Name	Middle Name	SSN	Birth Date
Daisy	Lane		235-46-3745	01/01/1960
Rebecca	Howard		266-79-3711	10/04/1962

Figure 4-6 - Dynamic Find Client Searches

Steps to execute a search in the “Find Client” Folder Menu

Step 1: Enter information in the search criteria, click the “Search” button at the bottom right of the workspace container.



Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name: Tu

Last Name: Te

Middle Name:

Full Name (Last, First):

Social Security Number:

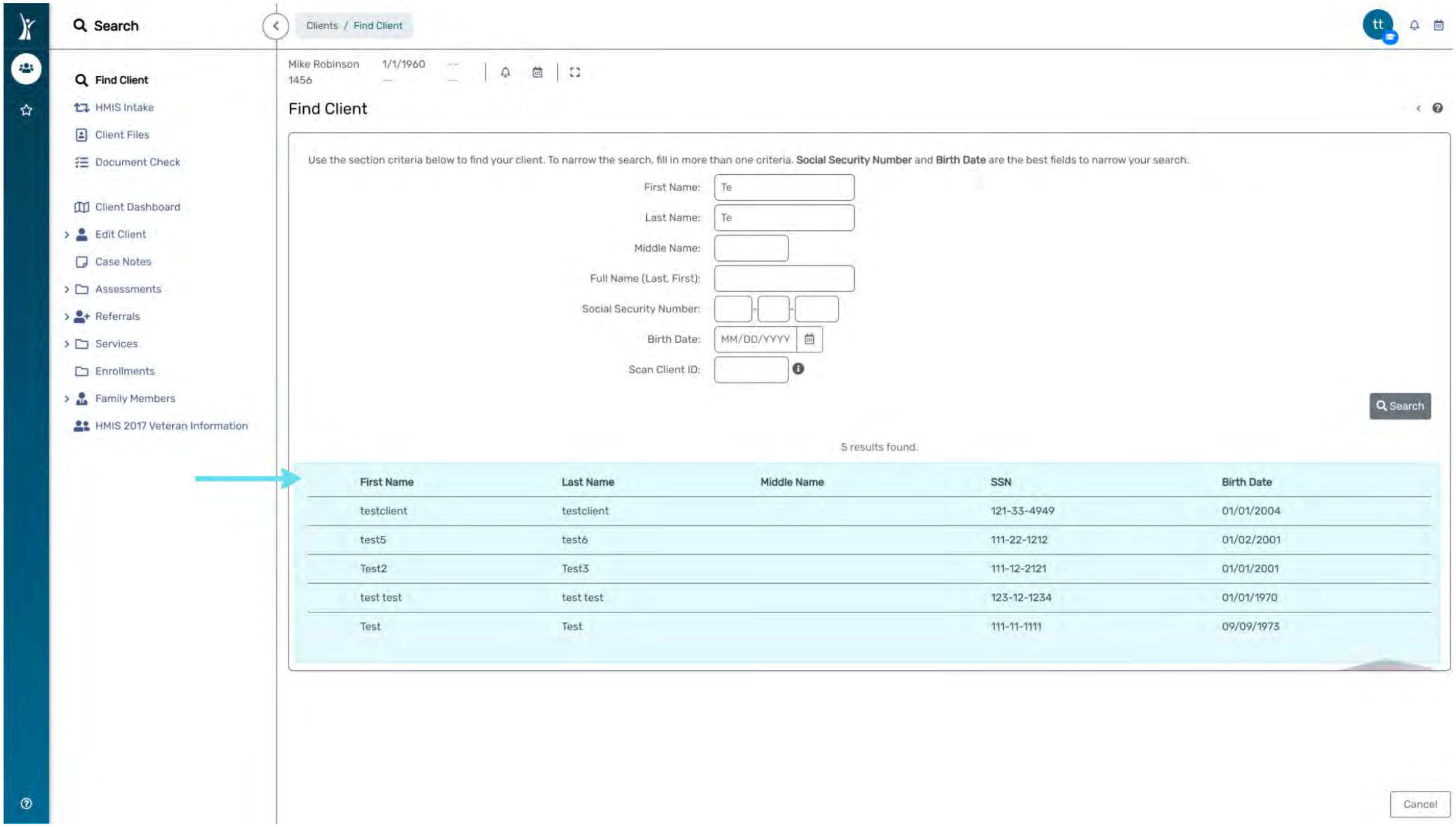
Birth Date: MM/DD/YYYY

Scan Client ID:

5 results found.

Figure 4-7 – Find Client Form

Step 2: The system will perform the search and return all clients that fit the search criteria. Look through the list of client records that return from using the search criteria in Step 4. Select the correct client record by clicking on the row with the client’s name. ClientTrack will navigate to the *Client Dashboard: Folder*.



Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name: Te
Last Name: Te
Middle Name:
Full Name (Last, First):
Social Security Number:
Birth Date: MM/DD/YYYY
Scan Client ID:

5 results found.

First Name	Last Name	Middle Name	SSN	Birth Date
testclient	testclient		121-33-4949	01/01/2004
test5	test6		111-22-1212	01/02/2001
Test2	Test3		111-12-2121	01/01/2001
test test	test test		123-12-1234	01/01/1970
Test	Test		111-11-1111	09/09/1973

Figure 4-8 – Find Client Search Results

If there are duplicate records, please send an email to HMIS@changinghomelessness.org or submit a ticket through ClientTrack's Help Center. When reporting duplicate records, in the note section, confirm which record should be kept using the client ID.

HMIS Intake: Folder

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

The **“**HMIS Intake” function will start a new program enrollment workflow**. Use this function to enroll a client into a new 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”.*

HMIS
How-To Tutorials

Need more help? Scan the QR code to visit: chiedconnect.net's Enrollment Tutorials

Figure 4-9.QR – Enrollment Tutorials

Steps to Navigate to the "HMIS Intake" Folder Menu

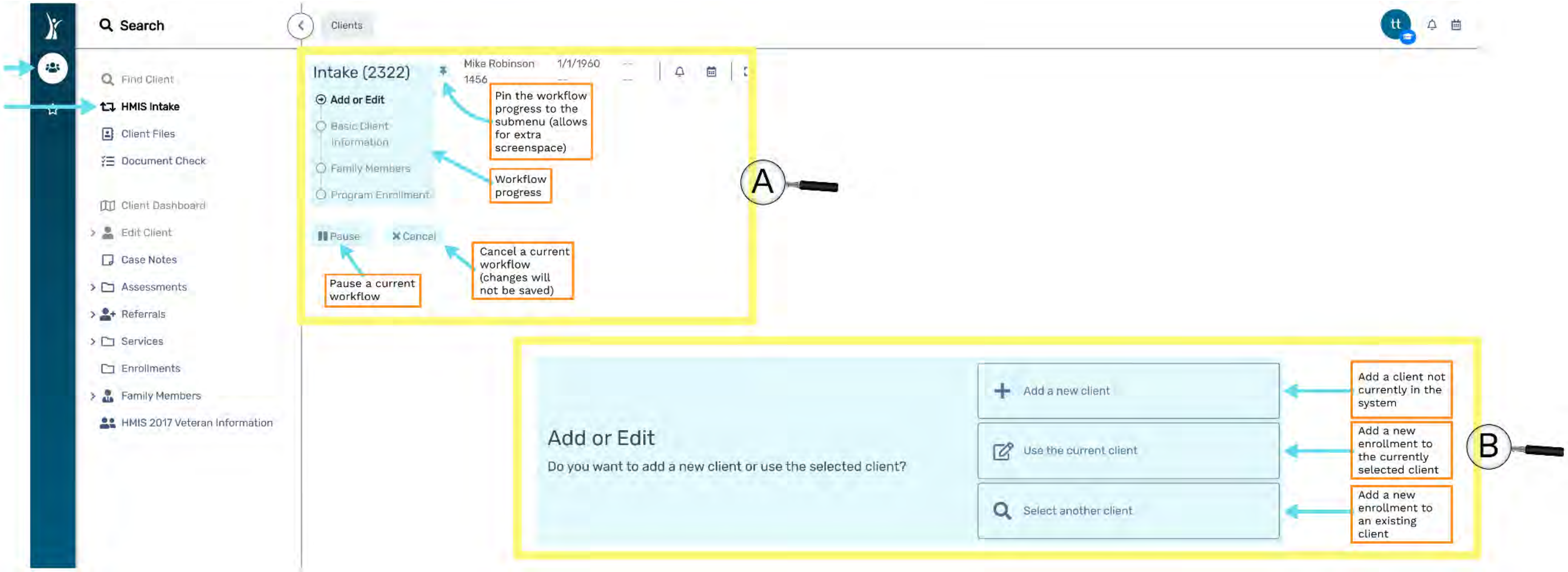
Step 1: Navigate to the Client Workspace*.

**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 "HMIS Intake" secondary sidebar* menu option. ClientTrack will navigate to the "Intake" 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".*

HMIS Intake Workflow Anatomy



Pin the workflow progress to the submenu (allows for extra screenspace)

Workflow progress

Pause a current workflow

Cancel a current workflow (changes will not be saved)

Add or Edit

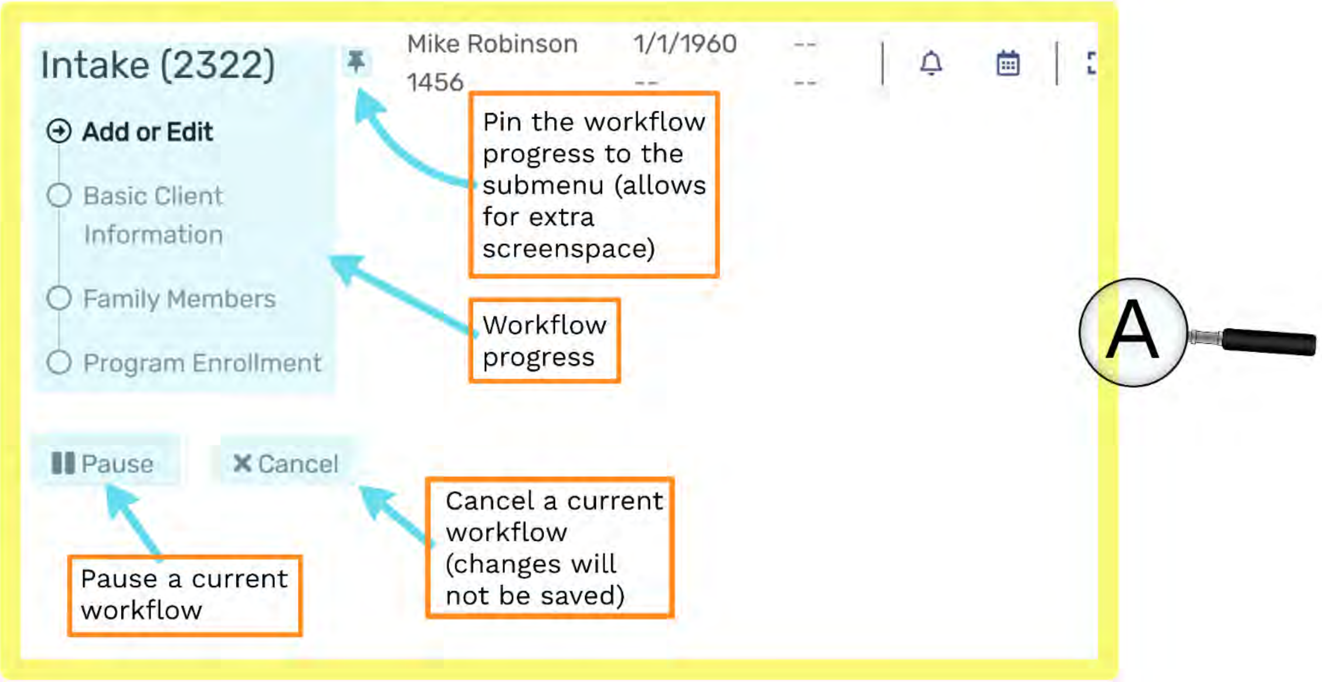
Do you want to add a new client or use the selected client?

Add a client not currently in the system

Add a new enrollment to the currently selected client

Add a new enrollment to an existing client

Figure 4-10 – HMIS Intake Workflow Anatomy



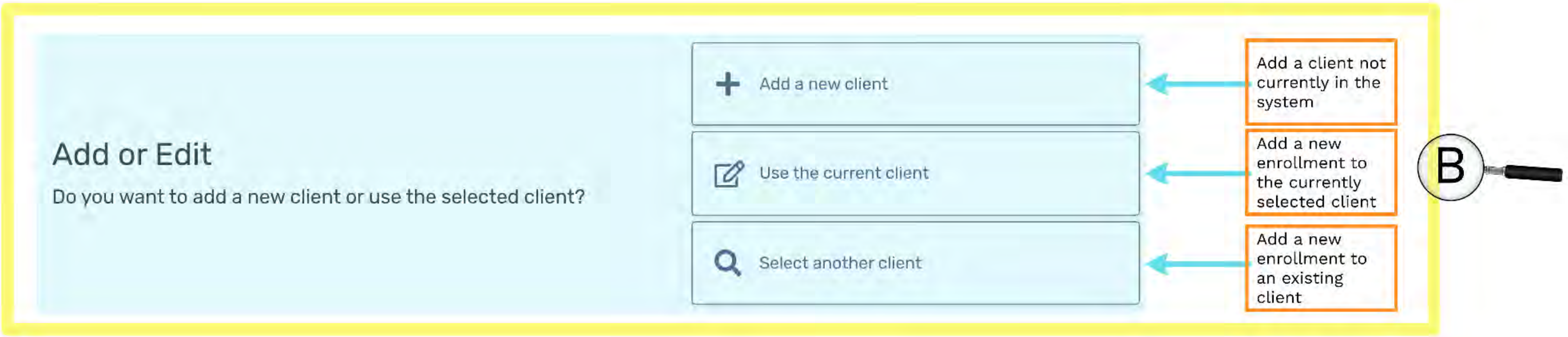
Pin the workflow progress to the submenu (allows for extra screenspace)

Workflow progress

Pause a current workflow

Cancel a current workflow (changes will not be saved)

Figure 4-11.a - HMIS Intake Workflow Anatomy



Do you want to add a new client or use the selected client?

Add a client not currently in the system

Add a new enrollment to the currently selected client

Add a new enrollment to an existing client

Figure 4-12.b - HMIS Intake Workflow Anatomy

HMIS Intake Workflow Methodology

STEPS	DATA COLLECTED Universal Data Elements Program Specific Data Elements	PAUSING HERE WILL	CLOSING HERE WILL
Basic Client Information	First Name Last Name Name Quality Social Security Number SSN Quality Birth Date Date of Birth Quality Ethnicity Race Gender Disabling Condition Veteran Status (18+) Relationship to Head of Household	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	For existing clients: Erase the Workflow. The workflow will not be retrievable. For clients new to HMIS: A new client record will be created, but no enrollments will be started for that client
Family Members	**For Each Family Member Added:** First Name Last Name Name Quality Birth Date Date of Birth Quality Ethnicity Social Security Number SSN Quality Race Relationship to Head of Household Gender Disabling Condition Veteran Status (18+)	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	For family members in HMIS: Erase the Workflow. The workflow will not be retrievable. For family members NEW to HMIS: A new record will be created for each new family member, but no enrollments will be started for those clients
Program Enrollment	**Select Program to Enroll Client In:** The list of available programs will depend on a few things: 1) Which programs your agency provides 2) If it is a new program, the HMIS Systems Team needs to know how you would like it set up in ClientTrack 3) If you are enrolling the client within the program start/end dates	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	Before clicking "Save": Erase the Workflow. The workflow will not be retrievable. After Clicking "Save": Save the Workflow under a Client's Enrollments
"POINT OF NO RETURN":	Once the "Save" button on the Program Enrollment form is clicked, do not change any data on the Basic Client Information, Family Members or Program Enrollment forms. The Workflow will not update. Instead, contact hmis@changinghomelessness.org or send an issue ticket.		
Head of Household Assessments	**Assessments:** Universal Data Assessment Program Specific Data Element Assessemnts vary by the specfic data elements a program is trying to capture. Examples include, but are not limited to, Veteran Details, Income, Current Living SItuation, Barriers/Special Needs.	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	Before clicking "Save": Close the workflow. All data on form will be lost. After Clicking "Save": Save the Workflow under a Client's Enrollments with all data saved. Partial workflow may lead to data quality issues

Figure 4-13 – HMIS Intake Workflow Navigation

Client Files: Folder

Tips and Tricks - *Client Files and Document Check*

Changing Homelessness recommends using Document Check for storing files on HMIS vs. Client Files

Figure 4-14 – Tips and Tricks – Client Files and Document Check

Steps to Navigate to the "Client Files" Folder Menu

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 "Client Files" secondary sidebar* menu option. ClientTrack will navigate back to the "Client Files" 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".

Download, Edit Document Names, and Preview in Client Files

Option 1: Click on the action button* and select “Download File”, “Edit Document Name”, or “Preview File”.

**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”.*

Option 2: Click on the Icon - To open a Client File, click on the icon of the document. This will download the file.

Upload Files in Client Files

Step 1: On the Client Files Page, click the “Add Files” button. For instructions on how to navigate to Client Files, see Client Files: Folder.

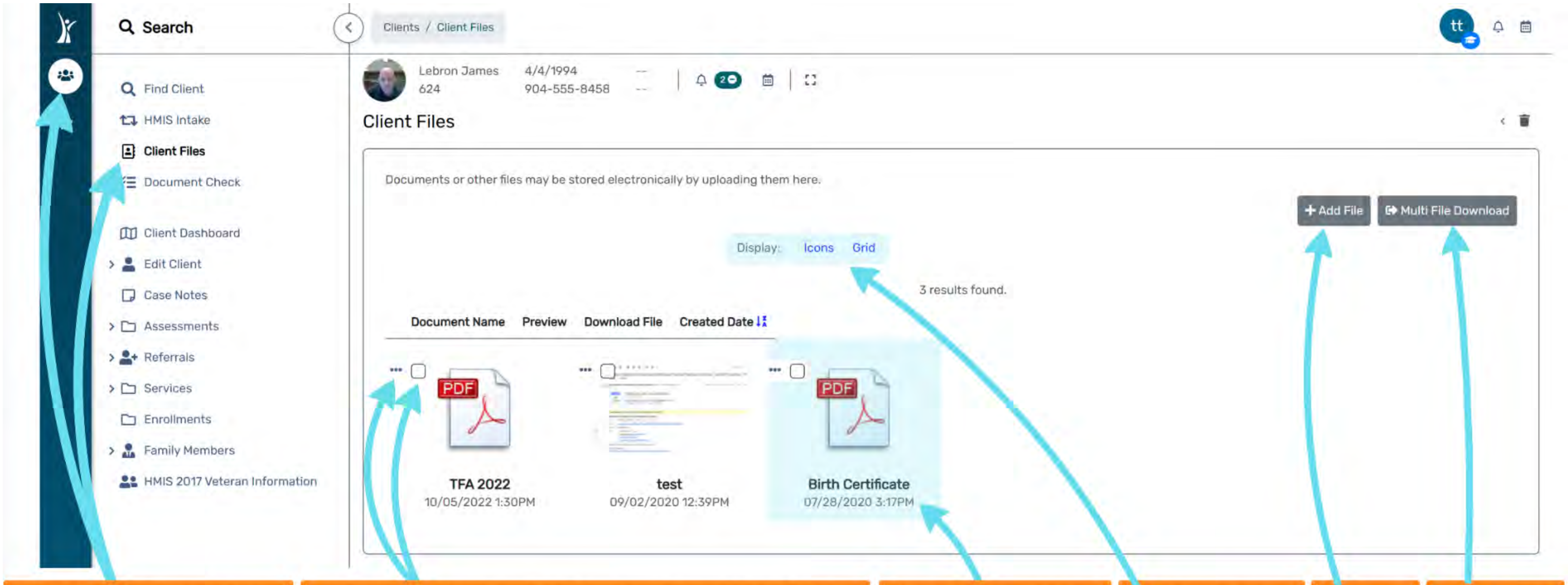
Step 2: On the following page, click the “Add File” button.

Step 3: Label the document in the “Document Name” box.

Step 4: Click the save button. ClientTrack will navigate back to the “Client Files” workspace container.

File Views in Client Files

Document views can be changed by clicking on “Icons” or “Grid”.



Documents or other files may be stored electronically by uploading them here.

3 results found.

Navigate to Client Files via Client Workspace and Client Files

Click the action button to view "Download File" and "Edit Document Name" options. Click in box to select file(s) for "Multi File Download"

Click in the general area of the file to view/download.

Change display between icons and grids

Upload a file

Download multiple files

Figure 4-15 - Client Files

Document Check: Folder

The “Document Check” folder stores client files. Document check files are stored in a client’s individual profile. “Document Check” allows for detailed information to be captured about the type of documentation uploaded to the client record. As of the publishing of this user manual, “Document Check” is the standard for uploading documents instead of the Client Files: Folder option.

Accessing “Document Check” – Method #1 (of 2)

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”.***

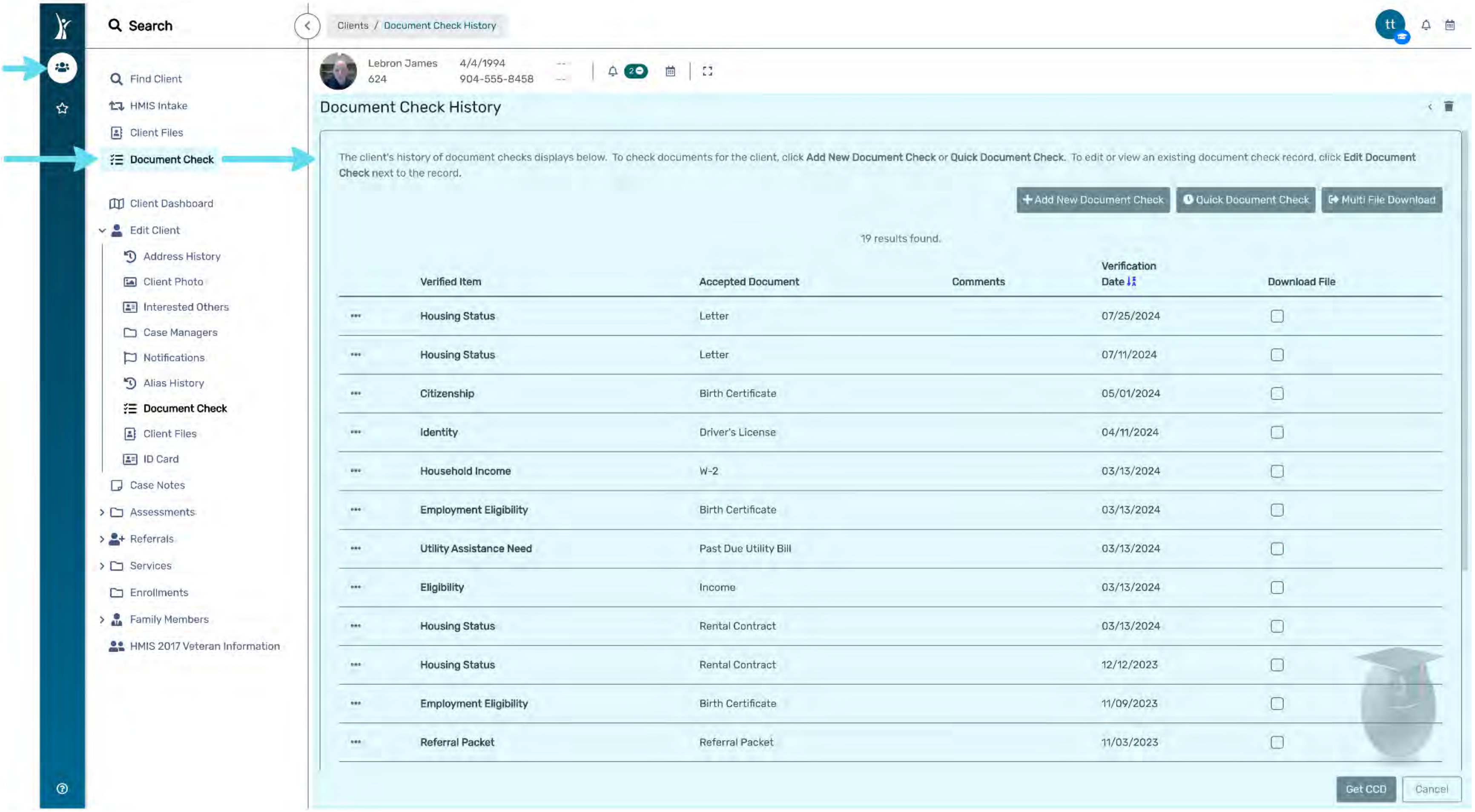
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*** 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 “Document Check” secondary sidebar* menu option. ClientTrack will navigate to the “Document Check History” 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 James 624 4/4/1994 904-555-8458

Document Check History

The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record.

19 results found.

	Verified Item	Accepted Document	Comments	Verification Date	Download File
•••	Housing Status	Letter		07/25/2024	☐
•••	Housing Status	Letter		07/11/2024	☐
•••	Citizenship	Birth Certificate		05/01/2024	☐
•••	Identity	Driver's License		04/11/2024	☐
•••	Household Income	W-2		03/13/2024	☐
•••	Employment Eligibility	Birth Certificate		03/13/2024	☐
•••	Utility Assistance Need	Past Due Utility Bill		03/13/2024	☐
•••	Eligibility	Income		03/13/2024	☐
•••	Housing Status	Rental Contract		03/13/2024	☐
•••	Housing Status	Rental Contract		12/12/2023	☐
•••	Employment Eligibility	Birth Certificate		11/09/2023	☐
•••	Referral Packet	Referral Packet		11/03/2023	☐

Figure 4-16 – Document Check

Accessing “Document Check” – Edit Client Menu Option – Method #2 (of 2)

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".*

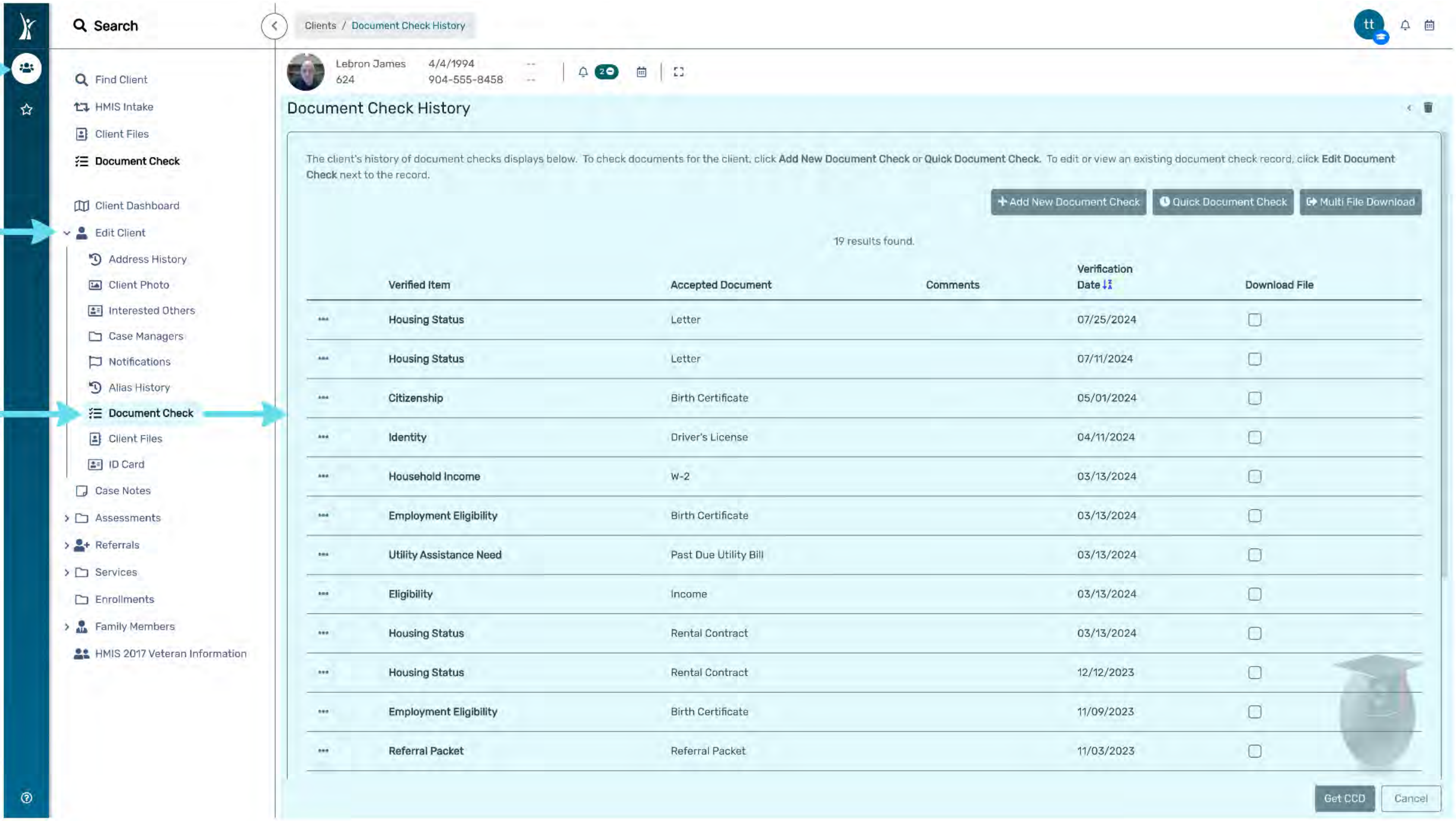
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".*

**** 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 "Edit Client" secondary sidebar* dropdown menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" folder.

**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".*

Step 3: Select the "Document Check" secondary sidebar menu option. ClientTrack will navigate to the "Document Check History" page.



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

Document Check History

The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record.

19 results found.

	Verified Item	Accepted Document	Comments	Verification Date	Download File
•••	Housing Status	Letter		07/25/2024	☐
•••	Housing Status	Letter		07/11/2024	☐
•••	Citizenship	Birth Certificate		05/01/2024	☐
•••	Identity	Driver's License		04/11/2024	☐
•••	Household Income	W-2		03/13/2024	☐
•••	Employment Eligibility	Birth Certificate		03/13/2024	☐
•••	Utility Assistance Need	Past Due Utility Bill		03/13/2024	☐
•••	Eligibility	Income		03/13/2024	☐
•••	Housing Status	Rental Contract		03/13/2024	☐
•••	Housing Status	Rental Contract		12/12/2023	☐
•••	Employment Eligibility	Birth Certificate		11/09/2023	☐
•••	Referral Packet	Referral Packet		11/03/2023	☐

Figure 4-17 – Document Check via Edit Client Folder

Document Check – File Categorization Methodology in “Document Check”

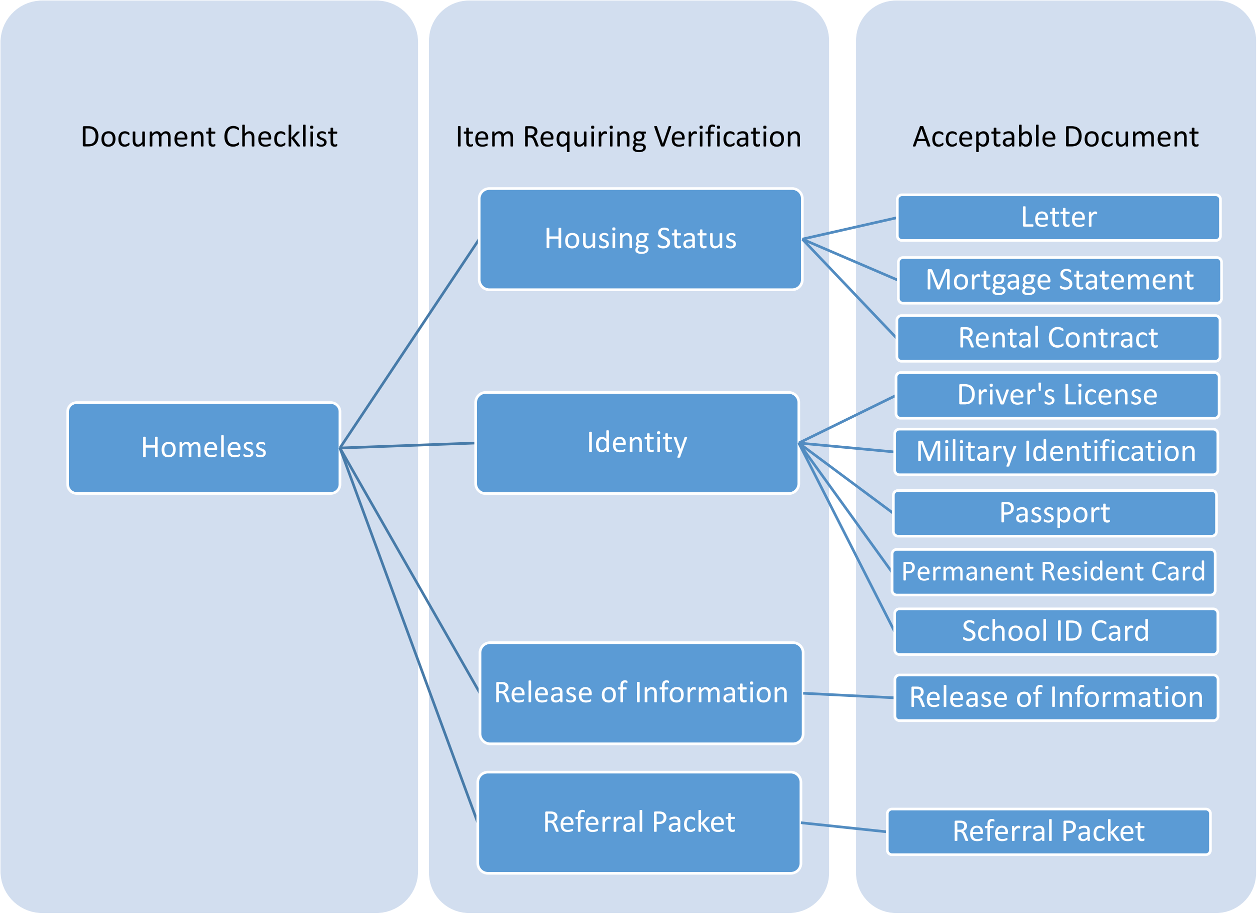


Figure 4-18 – File Categorization Methodology

Adding Documentation in “Document Check”

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”.*

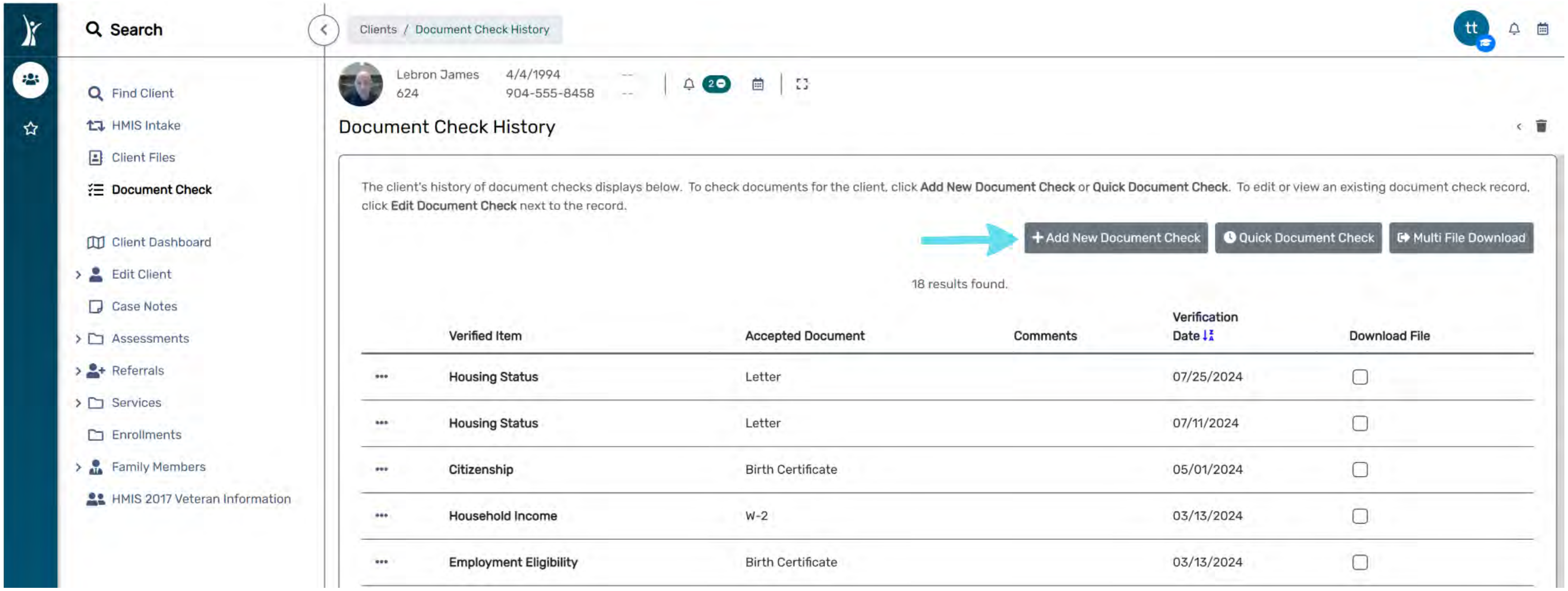
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** 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 “Document Check” secondary sidebar* menu option. ClientTrack will navigate to the “Document Check History” 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”.*

Step 3: Click “Add New Document Check” button.



The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record.

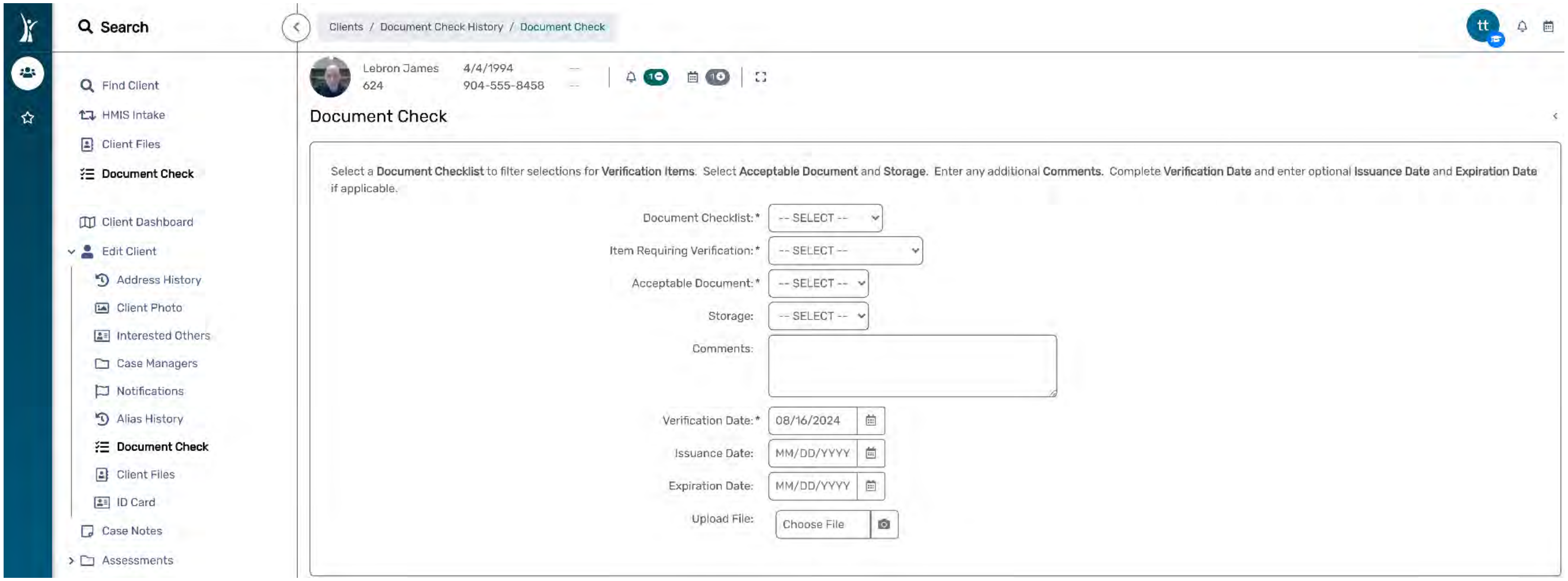
18 results found.

	Verified Item	Accepted Document	Comments	Verification Date	Download File
•••	Housing Status	Letter		07/25/2024	☐
•••	Housing Status	Letter		07/11/2024	☐
•••	Citizenship	Birth Certificate		05/01/2024	☐
•••	Household Income	W-2		03/13/2024	☐
•••	Employment Eligibility	Birth Certificate		03/13/2024	☐

Figure 4-19 – Adding a Document to "Document Check"

Step 4: This will bring you to the "Document Check"* form where supplemental information is added regarding the documentation you are uploading. Check with your supervisor on your program's requirements. Required elements are marked with a (*).

**For Document Check general file categoration, see Chapter 4: Client Workspace: Menu Optoins, Folders, and Subfolder/Document Check: Folder/Document Check – File Categorization Methodology.*



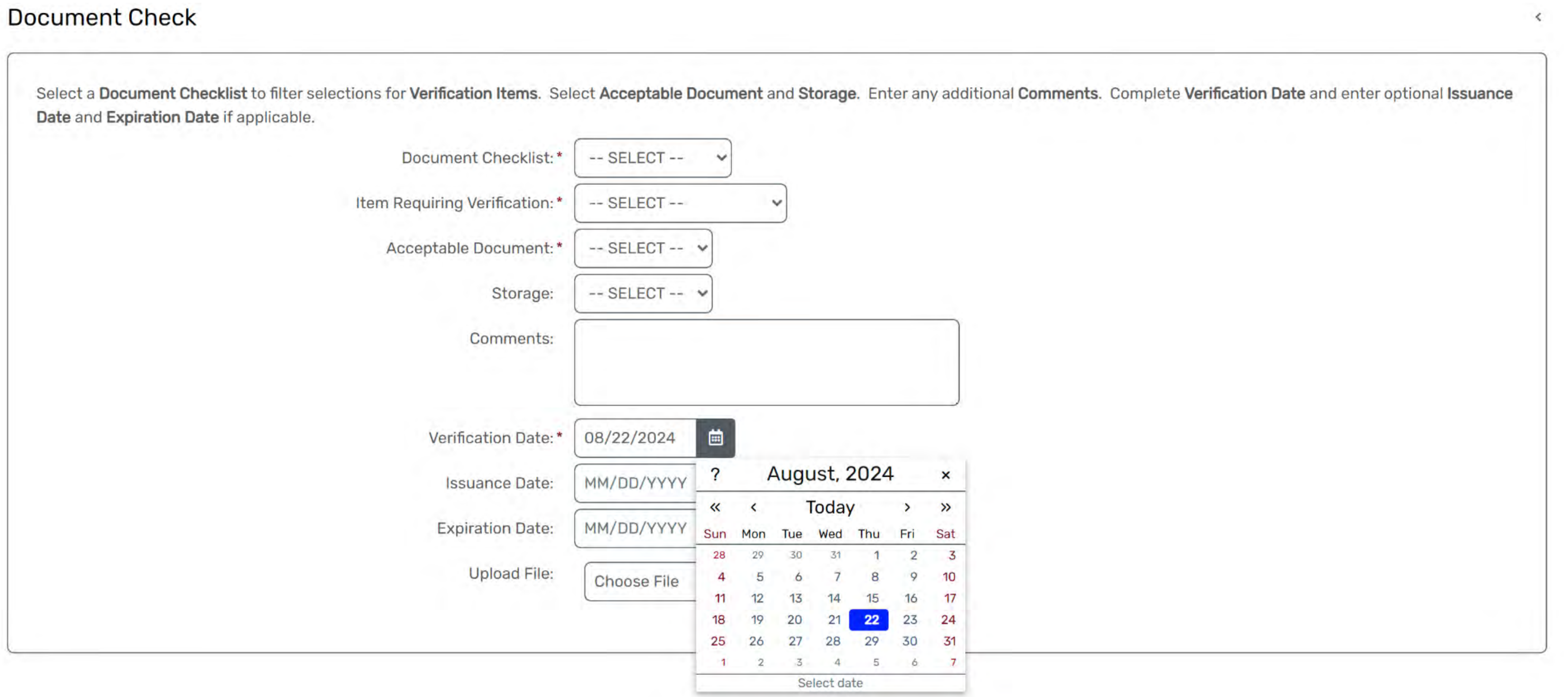
Document Check

Select a **Document Checklist** to filter selections for **Verification Items**. Select **Acceptable Document** and **Storage**. Enter any additional **Comments**. Complete **Verification Date** and enter optional **Issuance Date** and **Expiration Date** if applicable.

Document Checklist: * -- SELECT --
Item Requiring Verification: * -- SELECT --
Acceptable Document: * -- SELECT --
Storage: -- SELECT --
Comments:
Verification Date: * 08/16/2024
Issuance Date: MM/DD/YYYY
Expiration Date: MM/DD/YYYY
Upload File: Choose File

Figure 4-20 – Document Check Form

Step 5: Next, select the “Verification Date” by either typing the date in MMDDYYYY format or by clicking on the calendar and clicking on the date you wish to select.



Document Check

Select a **Document Checklist** to filter selections for **Verification Items**. Select **Acceptable Document** and **Storage**. Enter any additional **Comments**. Complete **Verification Date** and enter optional **Issuance Date** and **Expiration Date** if applicable.

Document Checklist:* -- SELECT --

Item Requiring Verification:* -- SELECT --

Acceptable Document:* -- SELECT --

Storage: -- SELECT --

Comments:

Verification Date:* 08/22/2024

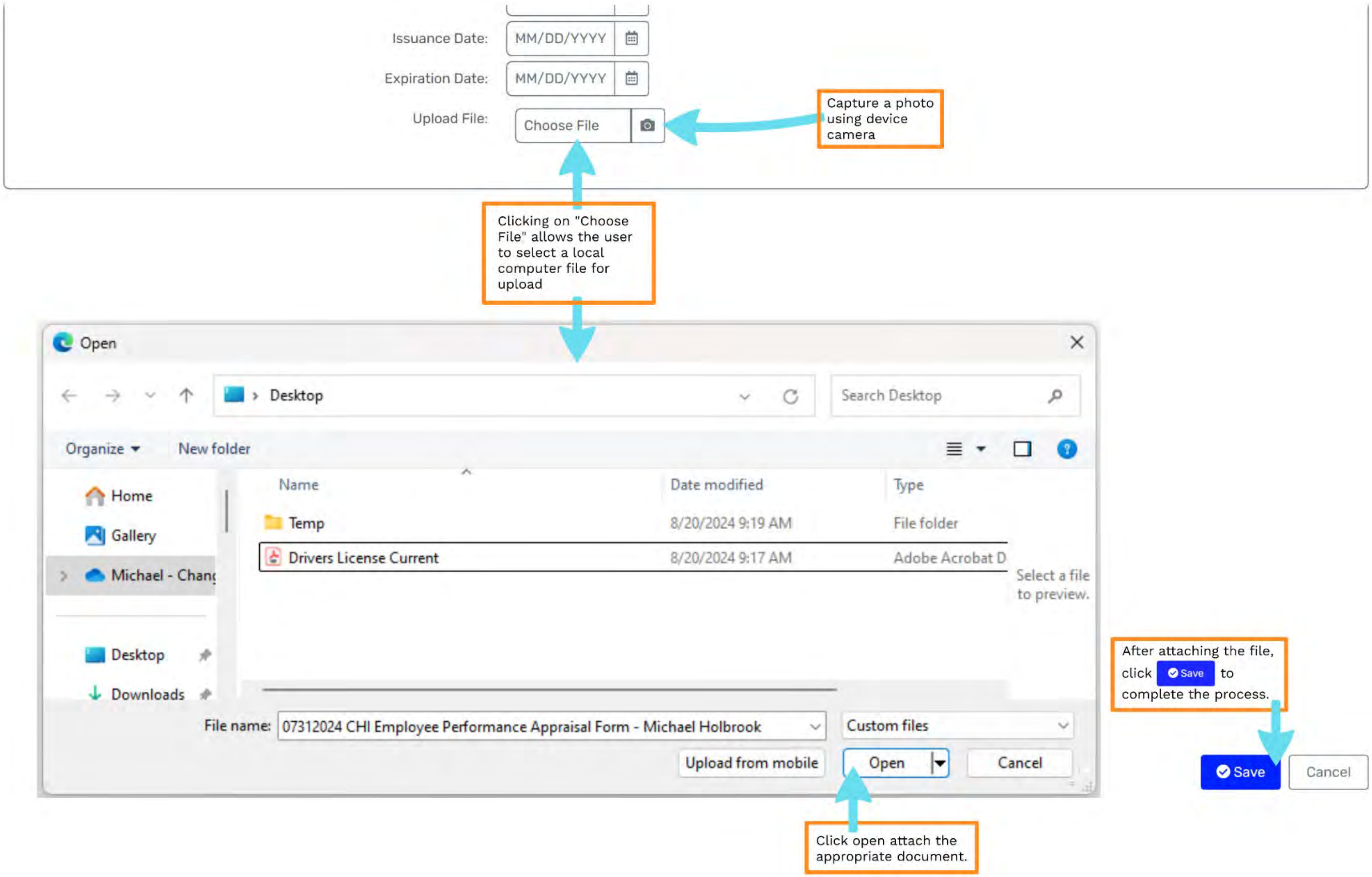
Issuance Date: MM/DD/YYYY

Expiration Date: MM/DD/YYYY

Upload File: Choose File

Figure 4-21 – Document Check Form Verification Date

Step 6: Click on the “Choose File” link to upload the file from your computer to the client’s record.



File name: 07312024 CHI Employee Performance Appraisal Form - Michael Holbrook

Custom files

Capture a photo using device camera

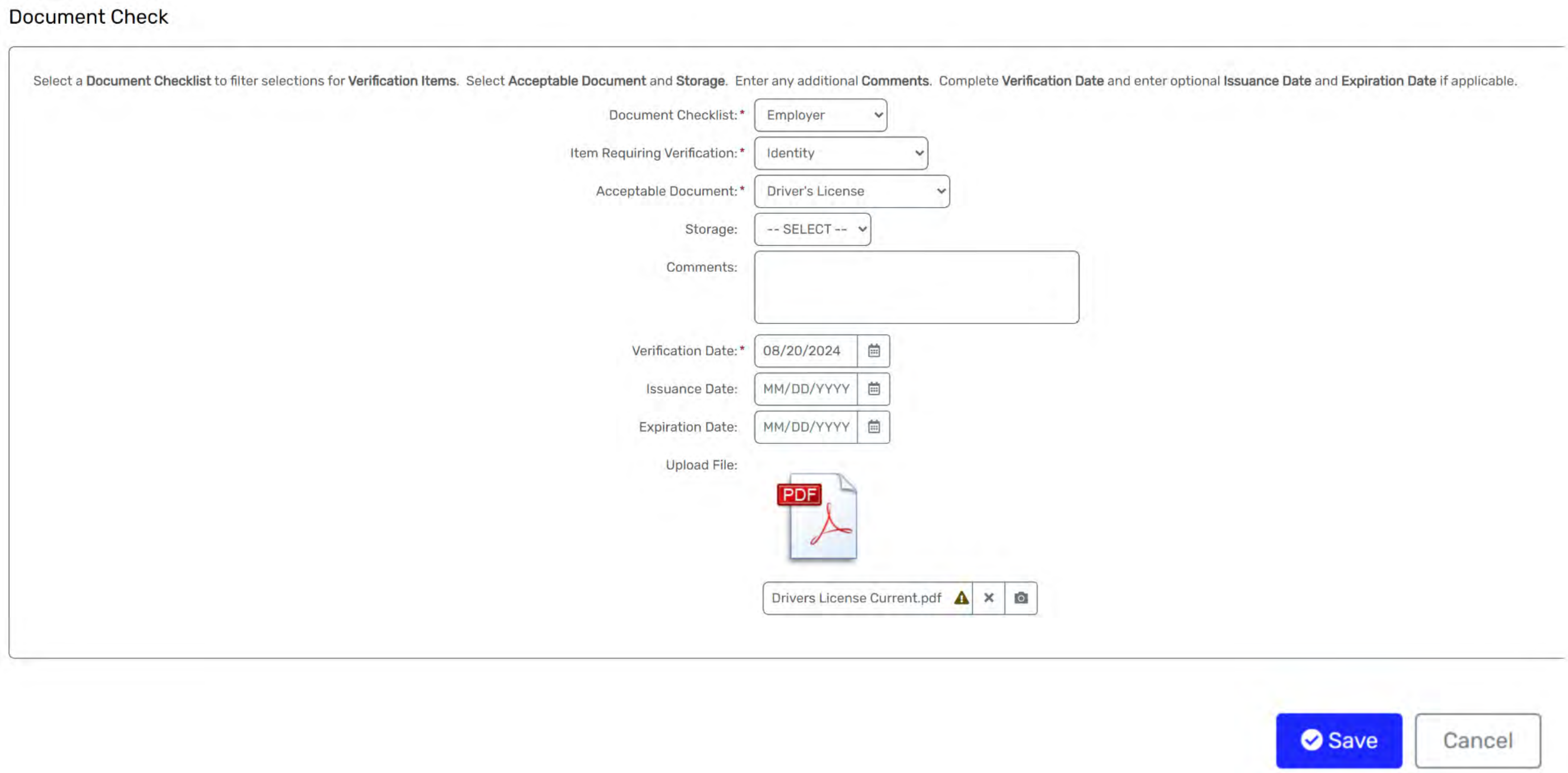
Clicking on "Choose File" allows the user to select a local computer file for upload

After attaching the file, click Save to complete the process.

Click open attach the appropriate document.

Figure 4-22 – Choosing a File in "Document Check"

Step 7: When completed, click “Save”. ClientTrack will navigate to the “Document Check History” workspace container.



Document Check

Select a **Document Checklist** to filter selections for **Verification Items**. Select **Acceptable Document** and **Storage**. Enter any additional **Comments**. Complete **Verification Date** and enter optional **Issuance Date** and **Expiration Date** if applicable.

Document Checklist:* Employer

Item Requiring Verification:* Identity

Acceptable Document:* Driver's License

Storage: -- SELECT --

Comments:

Verification Date:* 08/20/2024

Issuance Date: MM/DD/YYYY

Expiration Date: MM/DD/YYYY

Upload File: Drivers License Current.pdf

Figure 4-23 – Save Document in “Document Check“

Adding Multiple Documents Using Quick Document Check

You can add multiple documents into "Document Check" at the same time using Quick Document Check.

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".*

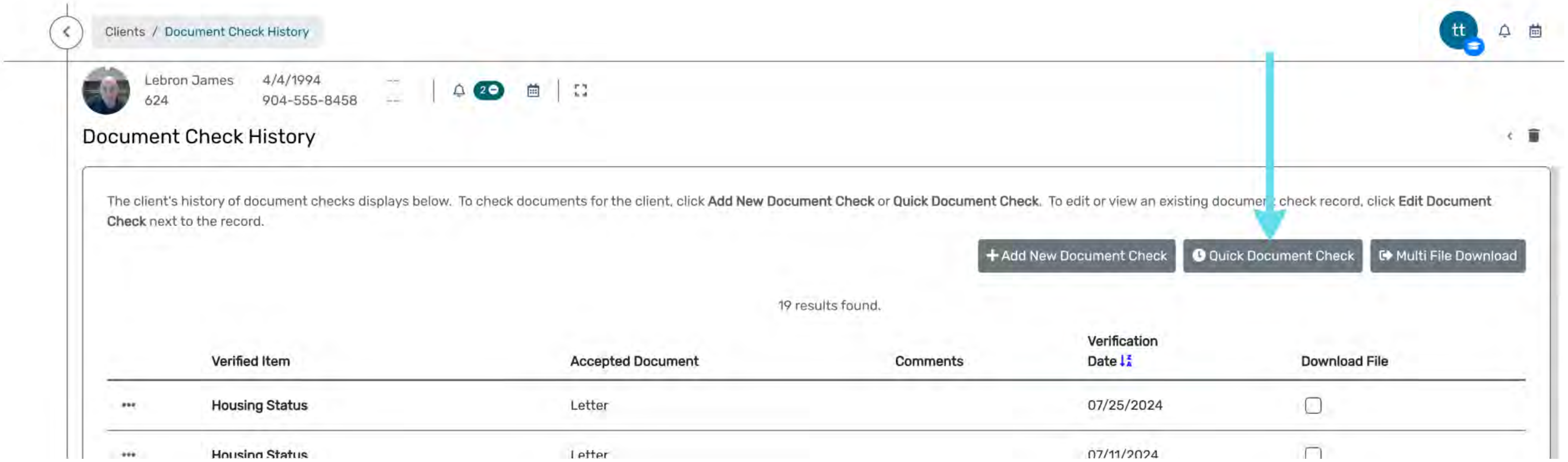
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".*

**** 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 "Document Check" secondary sidebar* menu option. ClientTrack will navigate to the "Document Check History" 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".*

Step 3: Click the "Quick Document Check" button.



The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record.

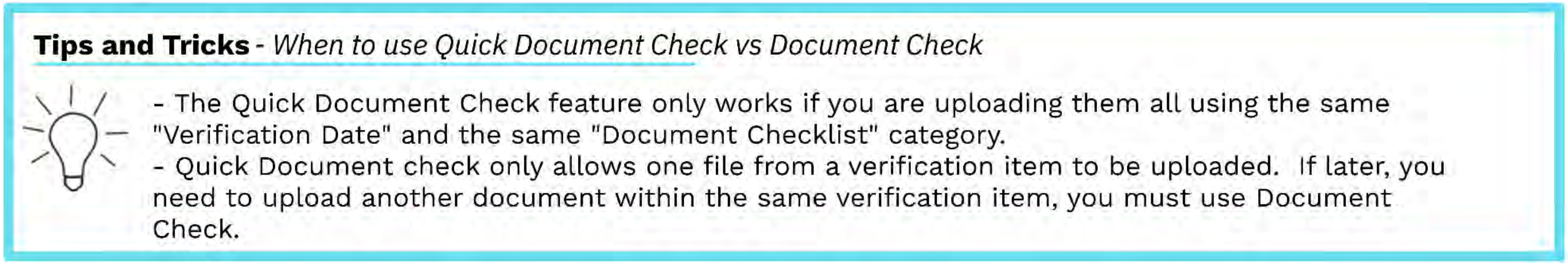
19 results found.

	Verified Item	Accepted Document	Comments	Verification Date	Download File
•••	Housing Status	Letter		07/25/2024	☐
•••	Housing Status	Letter		07/11/2024	☐

Figure 4-24 – Quick Document Check

Step 4: ClientTrack will navigate to the "Quick Document Check" form where multiple documents may be uploaded simultaneously. Required elements are marked with a (*).

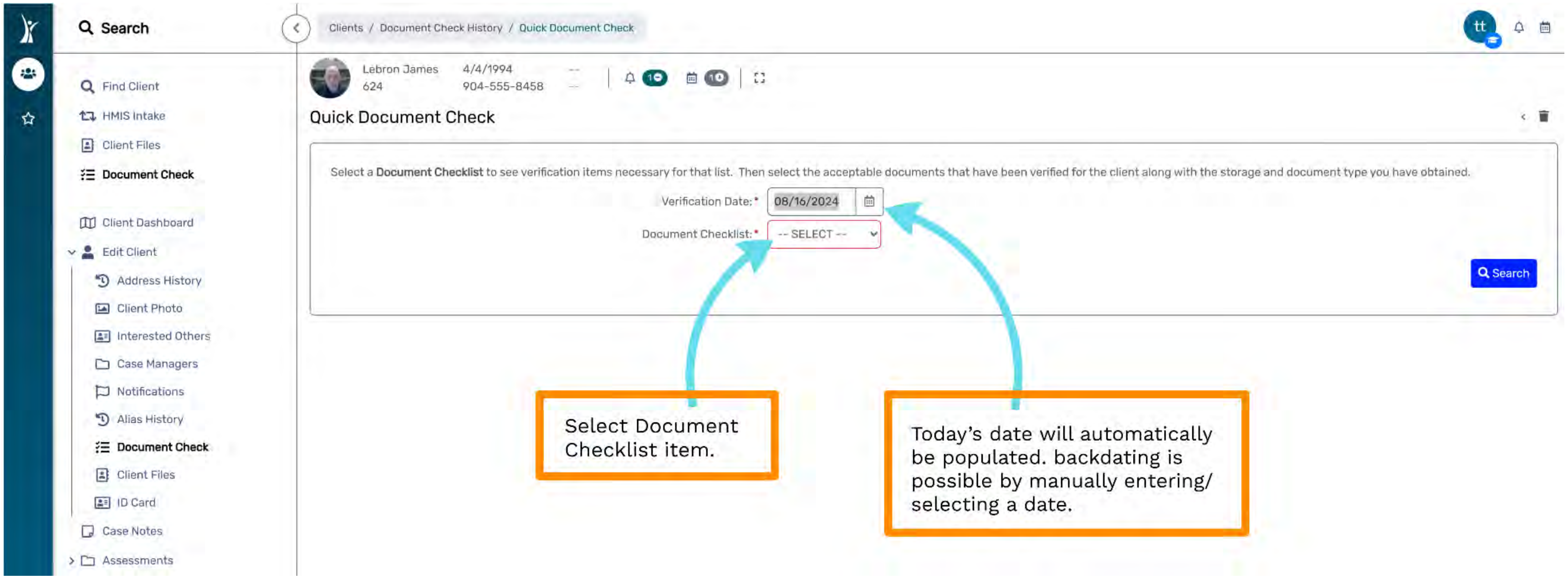
Step 5: Add supplemental information regarding the documentation you are uploading. The form provides a blank "template" row for each "Verification Item".



Tips and Tricks - *When to use Quick Document Check vs Document Check*

- The Quick Document Check feature only works if you are uploading them all using the same "Verification Date" and the same "Document Checklist" category.
- Quick Document check only allows one file from a verification item to be uploaded. If later, you need to upload another document within the same verification item, you must use Document Check.

Figure 4-25 – Tips and Tricks – Quick Document Check vs. Document Check



Quick Document Check

Select a **Document Checklist** to see verification items necessary for that list. Then select the acceptable documents that have been verified for the client along with the storage and document type you have obtained.

Verification Date:* 08/16/2024

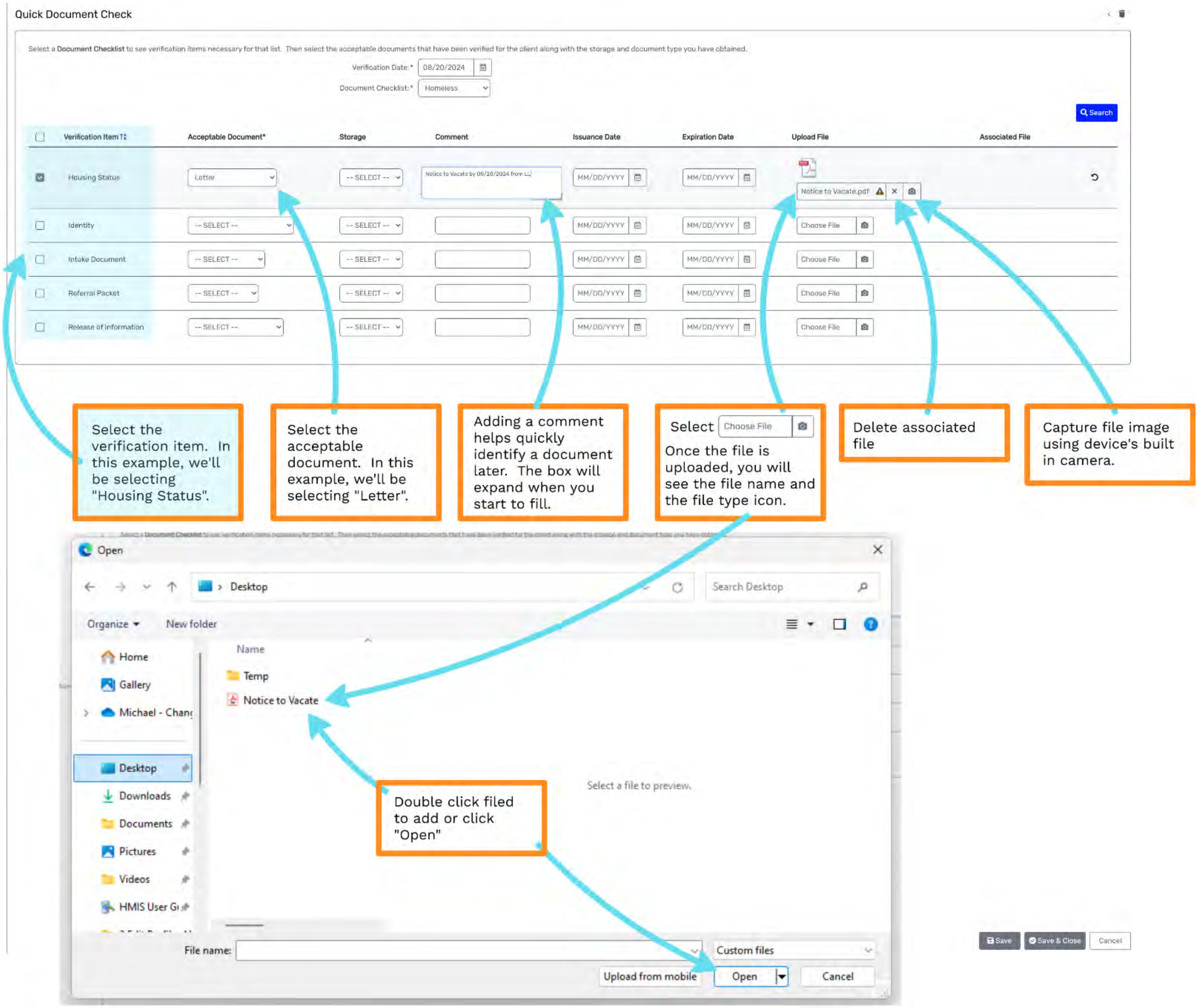
Document Checklist:* -- SELECT --

Select Document Checklist item.

Today's date will automatically be populated. backdating is possible by manually entering/ selecting a date.

Figure 4-26 – Quick Document Check Form

Step 6: Add documents as applicable to one or more rows. At least one file must be uploaded for each checked row. Click on the “Choose file” and choose a file from a locally stored document.



Quick Document Check

Select a **Document Checklist** to see verification items necessary for that list. Then select the acceptable documents that have been verified for the client along with the storage and document type you have obtained.

Verification Date:* 08/20/2024

Document Checklist:* Homeless

☐	Verification Item	Acceptable Document*	Storage	Comment	Issuance Date	Expiration Date	Upload File	Associated File
☑	Housing Status	Letter	-- SELECT --	Notice to Vacate by 08/28/2024 from LL	MM/DD/YYYY	MM/DD/YYYY	Notice to Vacate.pdf	
☐	Identity	-- SELECT --	-- SELECT --		MM/DD/YYYY	MM/DD/YYYY	Choose File	
☐	Intake Document	-- SELECT --	-- SELECT --		MM/DD/YYYY	MM/DD/YYYY	Choose File	
☐	Referral Packet	-- SELECT --	-- SELECT --		MM/DD/YYYY	MM/DD/YYYY	Choose File	
☐	Release of Information	-- SELECT --	-- SELECT --		MM/DD/YYYY	MM/DD/YYYY	Choose File	

Select the verification item. In this example, we'll be selecting "Housing Status".

Select the acceptable document. In this example, we'll be selecting "Letter".

Adding a comment helps quickly identify a document later. The box will expand when you start to fill.

Select Choose File

Once the file is uploaded, you will see the file name and the file type icon.

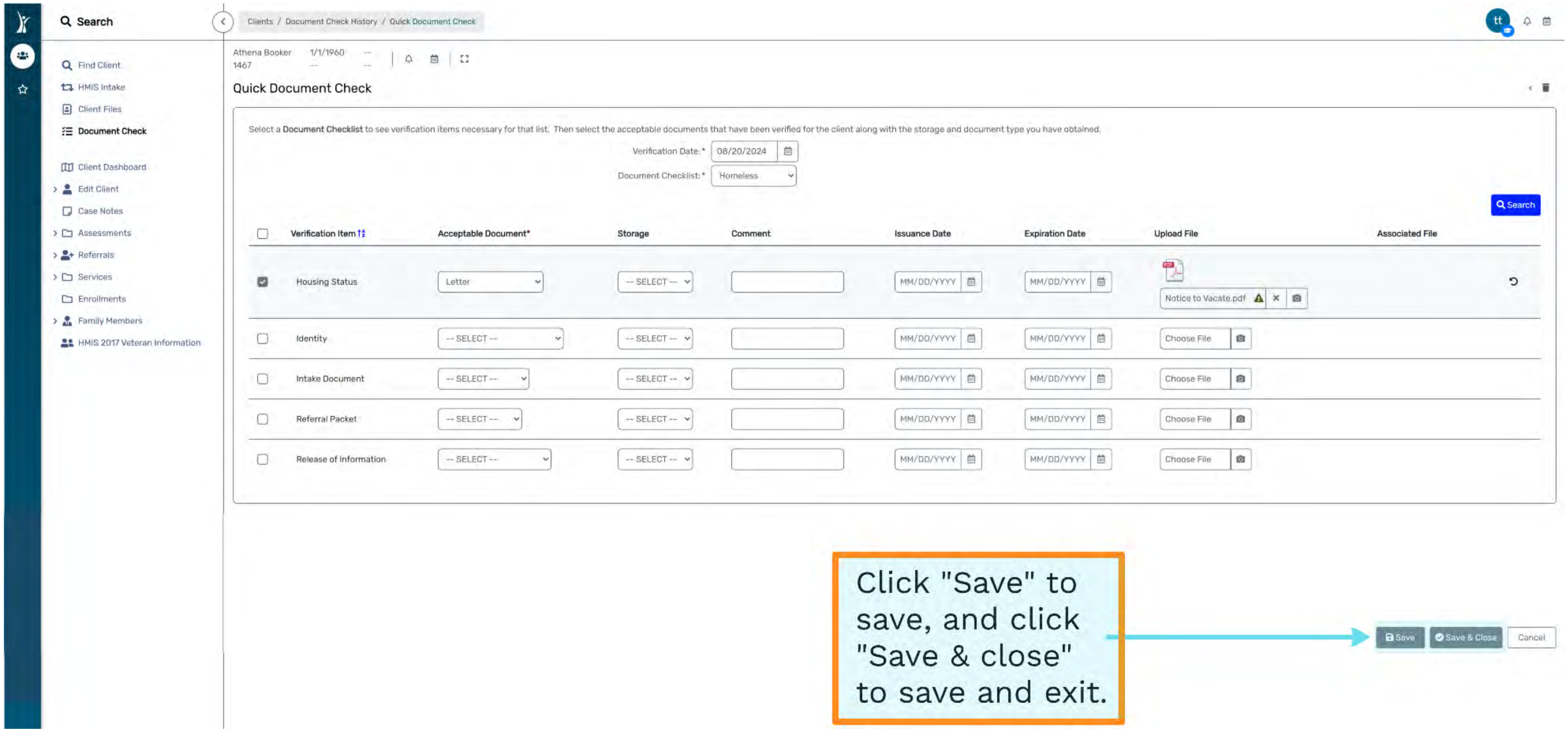
Delete associated file

Capture file image using device's built in camera.

Double click filed to add or click "Open"

Figure 4-27 – Quick Document Check - Anatomy

Step 8: An icon of the uploaded document can be found in the "Upload File" column. Click the "Save & Close" button. ClientTrack will navigate to the "Document Check History" workspace container. All uploaded documents will be listed.



Athena Booker 1/1/1960 --
1467 -- --

Quick Document Check

Select a **Document Checklist** to see verification items necessary for that list. Then select the acceptable documents that have been verified for the client along with the storage and document type you have obtained.

Verification Date:* 08/20/2024

Document Checklist:* Homeless

☐	Verification Item	Acceptable Document*	Storage	Comment	Issuance Date	Expiration Date	Upload File	Associated File
☑	Housing Status	Letter	-- SELECT --		MM/DD/YYYY	MM/DD/YYYY	Notice to Vacate.pdf	
☐	Identity	-- SELECT --	-- SELECT --		MM/DD/YYYY	MM/DD/YYYY	Choose File	
☐	Intake Document	-- SELECT --	-- SELECT --		MM/DD/YYYY	MM/DD/YYYY	Choose File	
☐	Referral Packet	-- SELECT --	-- SELECT --		MM/DD/YYYY	MM/DD/YYYY	Choose File	
☐	Release of Information	-- SELECT --	-- SELECT --		MM/DD/YYYY	MM/DD/YYYY	Choose File	

Click "Save" to save, and click "Save & close" to save and exit.

Figure 4-28 – Save Quick Document Check

Editing Documents Uploaded in “Document Check”

Uploaded documents cannot be edited. Document Check details can be edited. Uploaded documents can be deleted and replaced.

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”.*

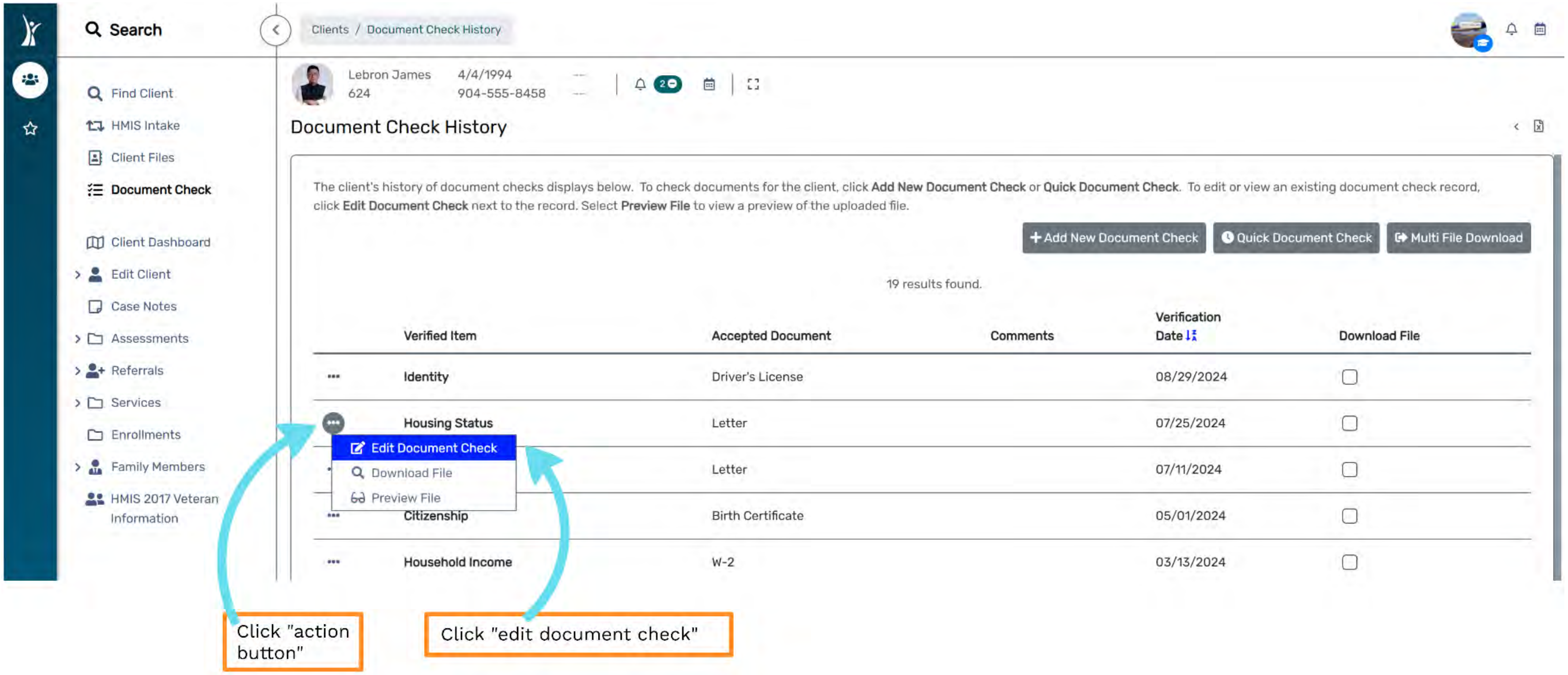
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** 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 “Document Check” secondary sidebar* menu option. ClientTrack will navigate to the “Document Check History” 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”.*

Step 3: Click on the action button next to the document to edit. Select “Edit Document Check”



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

Document Check History

The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record. Select **Preview File** to view a preview of the uploaded file.

19 results found.

	Verified Item	Accepted Document	Comments	Verification Date	Download File
•••	Identity	Driver's License		08/29/2024	☐
•••	Housing Status	Letter		07/25/2024	☐
		Letter		07/11/2024	☐
•••	Citizenship	Birth Certificate		05/01/2024	☐
•••	Household Income	W-2		03/13/2024	☐

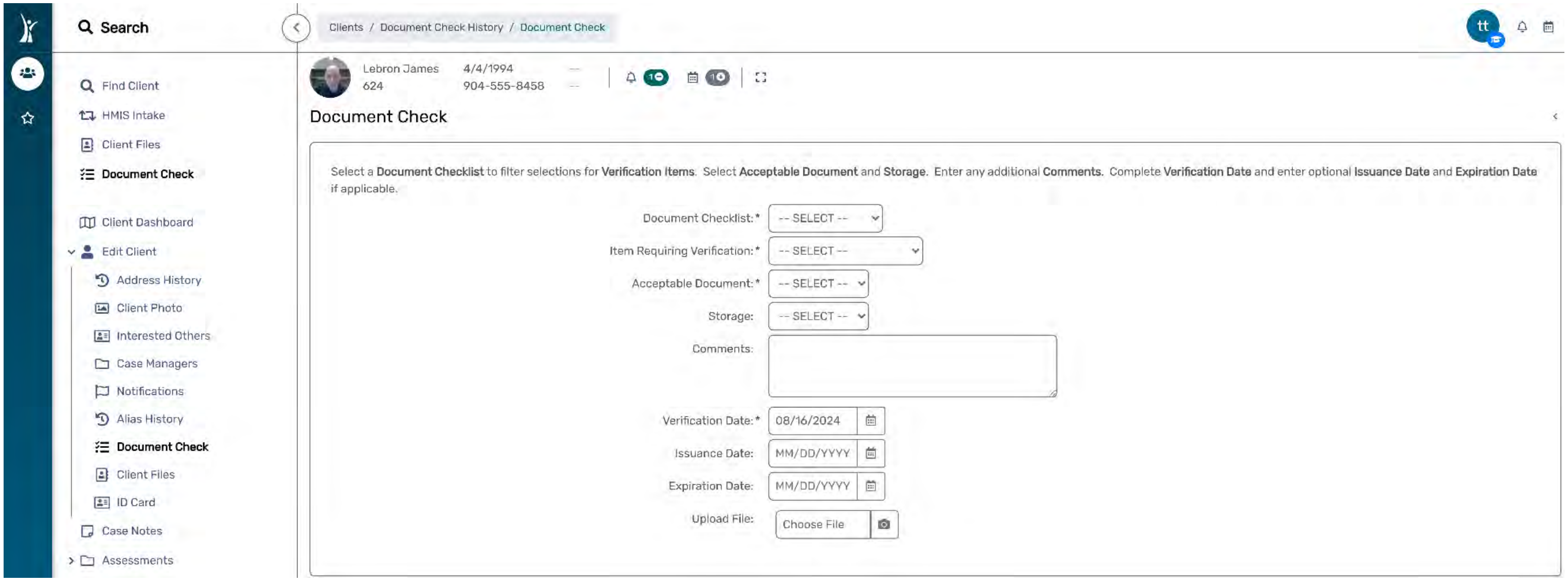
Click "action button"

Click "edit document check"

Figure 4-29 – Editing Entries in Document Check

Step 4: This will bring you to the “Document Check”* form where supplemental information is added regarding the documentation you are uploading. Required elements are marked with a (*).

**For Document Check general file categoration, see Chapter 4: Client Workspace: Menu Optoins, Folders, and Subfolder/Document Check: Folder/Document Check – File Categorization Methodology*.



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

Document Check

Select a **Document Checklist** to filter selections for **Verification Items**. Select **Acceptable Document** and **Storage**. Enter any additional **Comments**. Complete **Verification Date** and enter optional **Issuance Date** and **Expiration Date** if applicable.

Document Checklist:* -- SELECT --
Item Requiring Verification:* -- SELECT --
Acceptable Document:* -- SELECT --
Storage: -- SELECT --
Comments:
Verification Date:* 08/16/2024
Issuance Date: MM/DD/YYYY
Expiration Date: MM/DD/YYYY
Upload File: Choose File

Figure 4-30 – Document Check Form

Step 5: After edits are completed, click “Save”. ClientTrack will navigate to the “Document Check History” workspace container.

Downloading Documents in “Document Check”

Downloading a Single Document in “Document Check”

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”.*

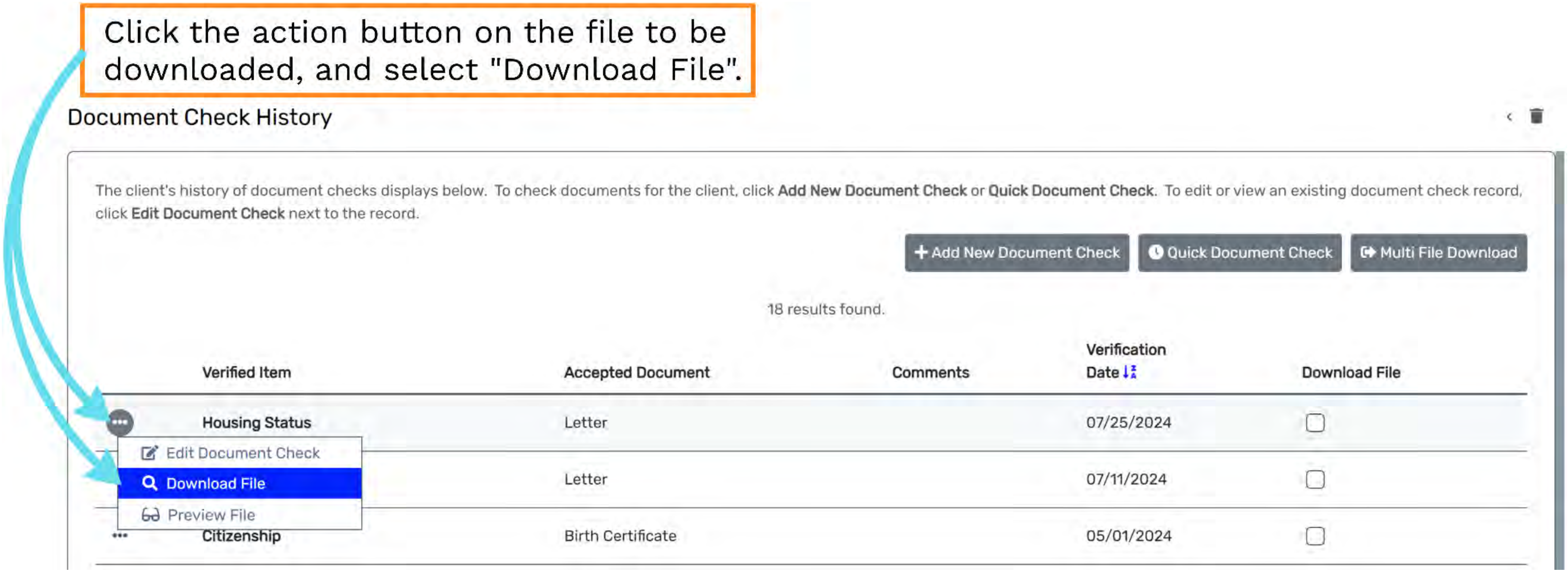
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Document Check” secondary sidebar* menu option. ClientTrack will navigate to the “Document Check History” 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”.*

Step 3: To download, click the action button next to the appropriate file.

Step 4: Select “Download File” to start the downloading the file.



Click the action button on the file to be downloaded, and select "Download File".

Document Check History

The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record.

18 results found.

Verified Item	Accepted Document	Comments	Verification Date	Download File
Housing Status	Letter		07/25/2024	☐
	Letter		07/11/2024	☐
Citizenship	Birth Certificate		05/01/2024	☐

Figure 4-31 – Download Files in Document Check

Downloading Multiple Files at Once in "Document Check"

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".*

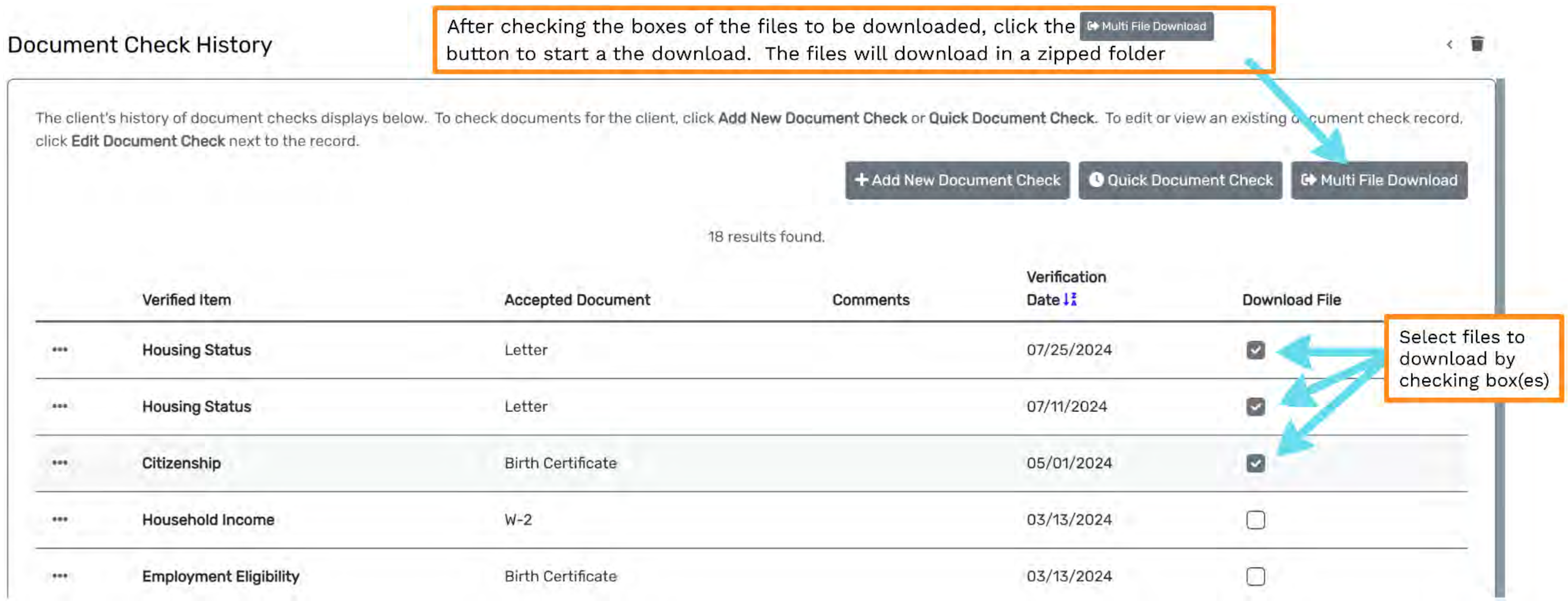
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

Step 2: Select the “Document Check” secondary sidebar* menu option. ClientTrack will navigate to the “Document Check History” 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”.*

Step 3: To download, click on the corresponding box under the “Download File” column.

Step 4: Select “Multi File Download” to start the files to be downloaded in a zipped folder.



After checking the boxes of the files to be downloaded, click the Multi File Download button to start a the download. The files will download in a zipped folder

The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record.

18 results found.

	Verified Item	Accepted Document	Comments	Verification Date	Download File
•••	Housing Status	Letter		07/25/2024	☑
•••	Housing Status	Letter		07/11/2024	☑
•••	Citizenship	Birth Certificate		05/01/2024	☑
•••	Household Income	W-2		03/13/2024	☐
•••	Employment Eligibility	Birth Certificate		03/13/2024	☐

Select files to download by checking box(es)

Figure 4-32 Download Multiple Files in Document Check

Step 5: Multiple files will download as a zipped folder. Extract the zipped folder to access downloaded files.

Previewing a Document in "Document Check"

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 "Document Check" secondary sidebar* menu option. ClientTrack will navigate to the "Document Check History" 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".*

Step 3: To preview a file, click the action button next to the appropriate file.

Step 4: Select "Preview File". A pop-up window will appear with the file preview.

Printing Documents in "Document Check"

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".*

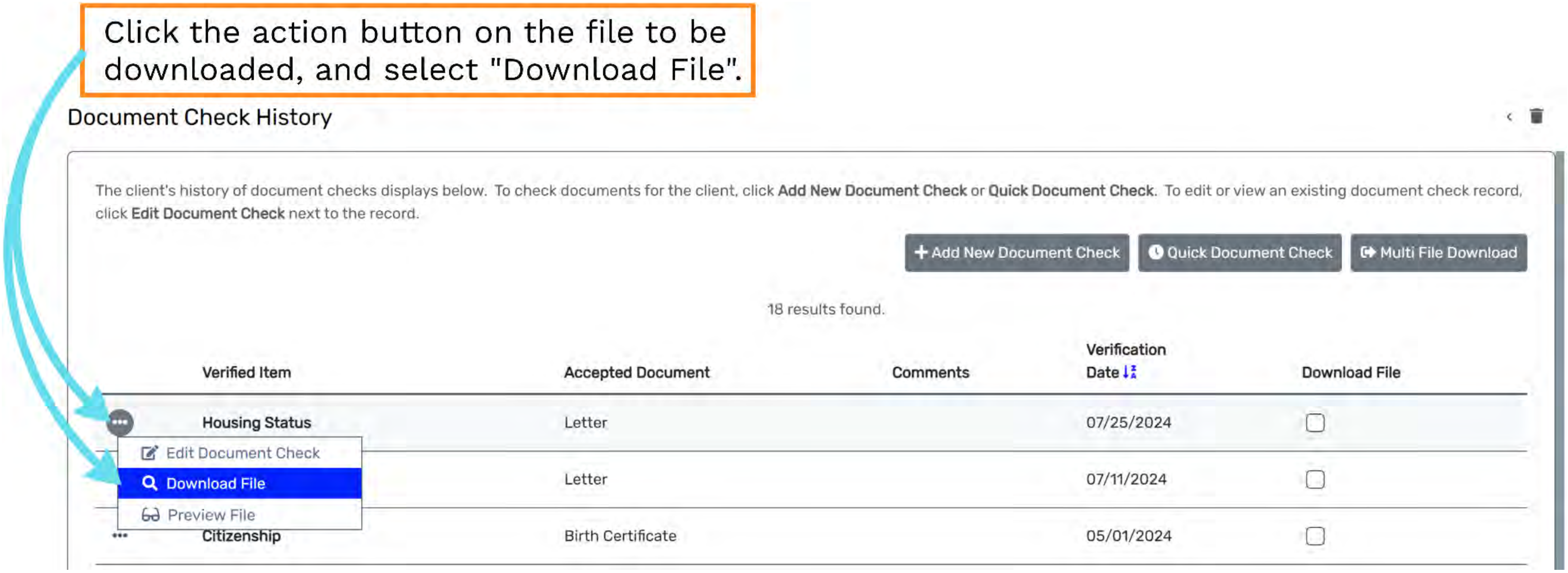
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

Step 2: Select the “Document Check” secondary sidebar* menu option. ClientTrack will navigate to the “Document Check History” 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”.*

Step 3: To print a file, click the action button next to the appropriate file and select “Download file”* or use the Multi File Download button.

**For instructions on how download documents in document check, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Document Check: Folder/[Downloading Documents in “Document Check”]() in the “HMIS Basic User 2025 Manual”.*



Click the action button on the file to be downloaded, and select "Download File".

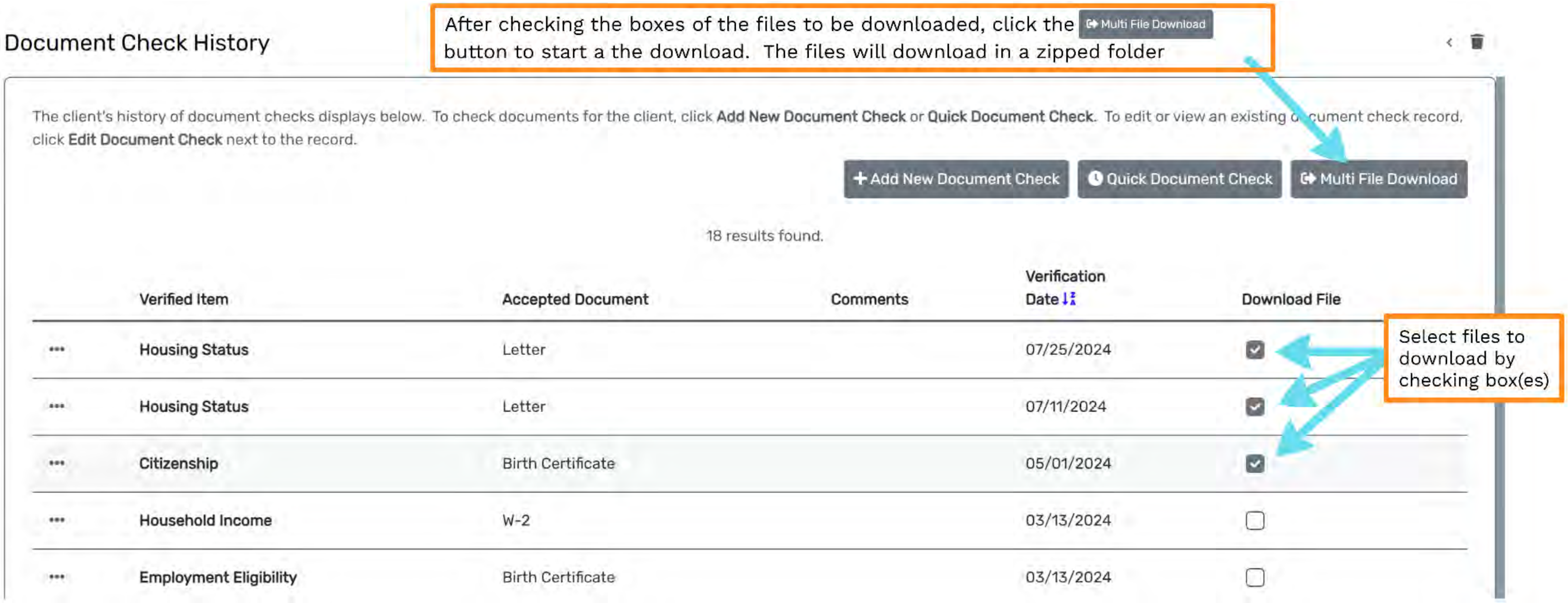
Document Check History

The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record.

18 results found.

Verified Item	Accepted Document	Comments	Verification Date	Download File
Housing Status	Letter		07/25/2024	☐
	Letter		07/11/2024	☐
Citizenship	Birth Certificate		05/01/2024	☐

Figure 4-33 – Download Files in Document Check



Document Check History

After checking the boxes of the files to be downloaded, click the Multi File Download button to start a the download. The files will download in a zipped folder

The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record.

18 results found.

	Verified Item	Accepted Document	Comments	Verification Date	Download File
•••	Housing Status	Letter		07/25/2024	☑
•••	Housing Status	Letter		07/11/2024	☑
•••	Citizenship	Birth Certificate		05/01/2024	☑
•••	Household Income	W-2		03/13/2024	☐
•••	Employment Eligibility	Birth Certificate		03/13/2024	☐

Select files to download by checking box(es)

Figure 4-34 – Download Multiple Files in Document Check

Step 4: A single file download will download as a PDF. Multiple file downloads will be downloaded as a zipped file.

Step 5: Use local print procedures to print out downloaded documents.

Client Dashboard: Folder

The “Client Dashboard” menu option on the *Client Workspace* provides a limited functionality* summary of a Client’s profile. ClientTrack defaults to the “Client Dashboard” when the “Client Workspace” is initially selected. The “Client Dashboard” includes the following categories.

- Client Information**
- Client Enrollments***
- Client Services****

**Full versions of client information, enrollments, and client services are available in the Edit Client: Folder, Enrollments: Folder, and Services: Folder folders in the Client Workspace.*

***Client Information: To learn how to navigate to the “Edit Client” folder, see Chapter 4: Client Workspace Menu Options, Folders, and Subfolders/Edit Client: 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”.*

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

Steps to Navigate to the “Client Dashboard” Folder Menu

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”.***

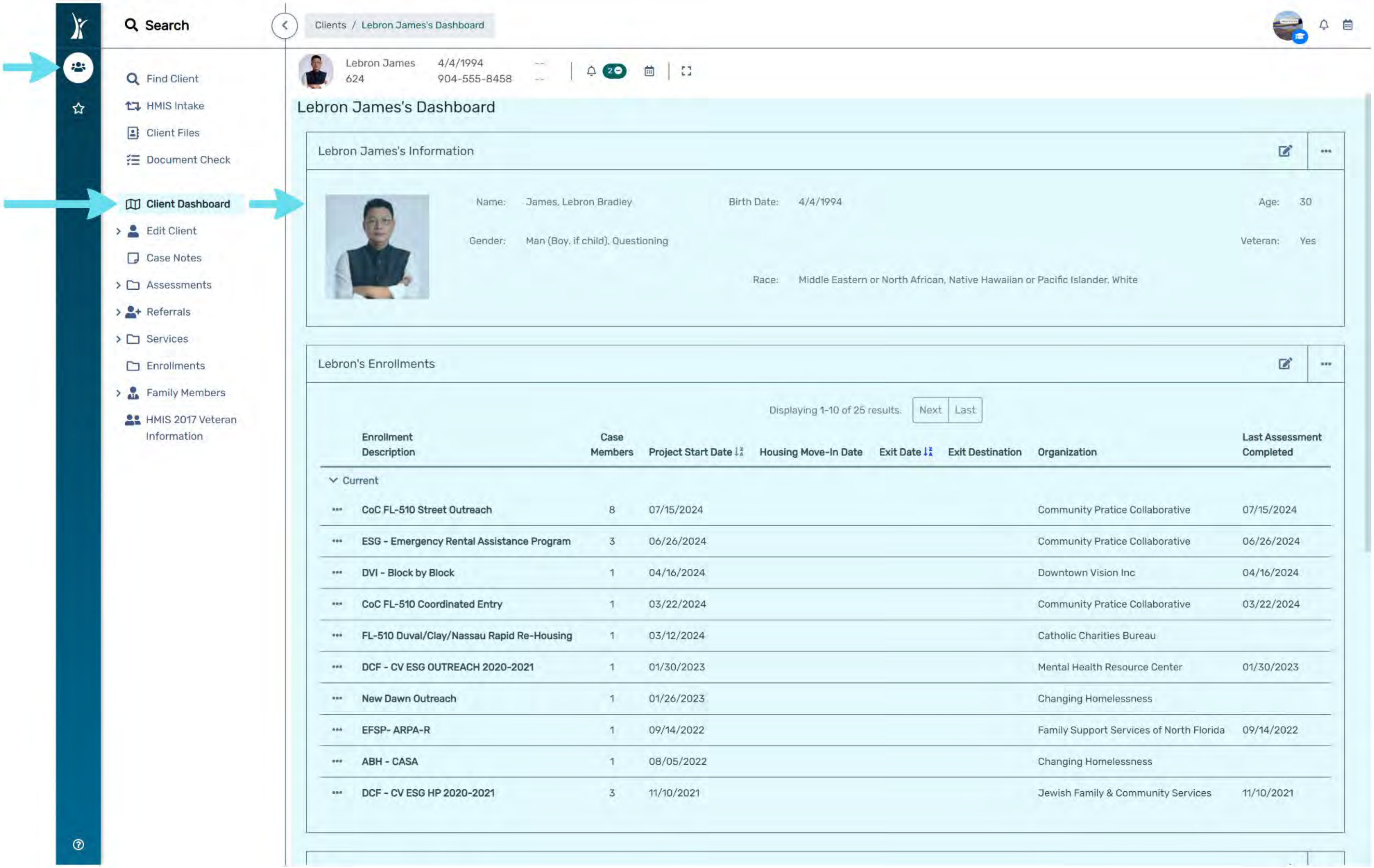
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*** 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 “Client Dashboard” secondary sidebar* menu option. ClientTrack will navigate to the client’s dashboard 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 James 4/4/1994 --
624 904-555-8458 --

Lebron James's Dashboard

Lebron James's Information

Name: James, Lebron Bradley

Birth Date: 4/4/1994

Age: 30

Gender: Man (Boy, if child), Questioning

Veteran: Yes

Race: Middle Eastern or North African, Native Hawaiian or Pacific Islander, White

Lebron's Enrollments

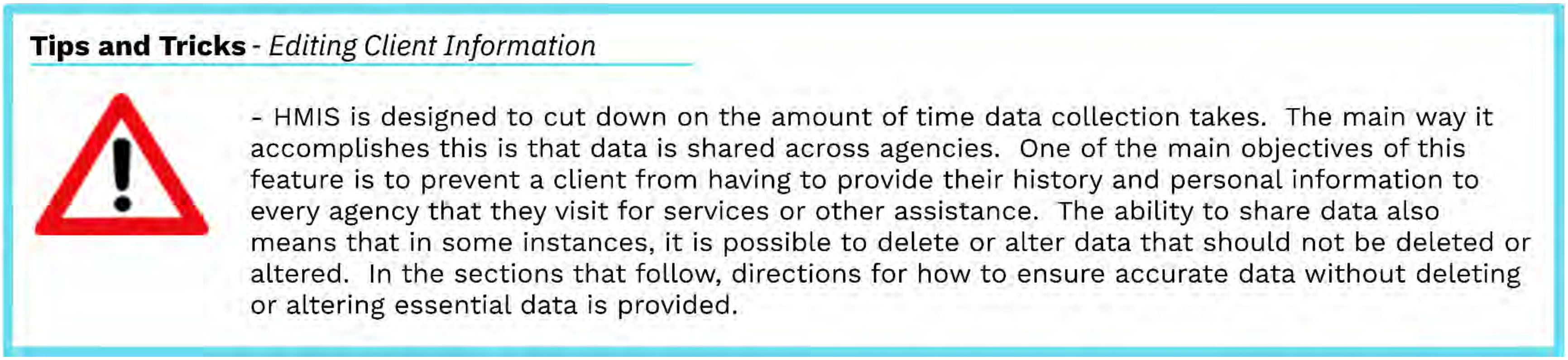
Displaying 1-10 of 25 results. Next Last

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 Pratice Collaborative	07/15/2024
ESG - Emergency Rental Assistance Program	3	06/26/2024				Community Pratice Collaborative	06/26/2024
DVI - Block by Block	1	04/16/2024				Downtown Vision Inc	04/16/2024
CoC FL-510 Coordinated Entry	1	03/22/2024				Community Pratice Collaborative	03/22/2024
FL-510 Duval/Clay/Nassau Rapid Re-Housing	1	03/12/2024				Catholic Charities Bureau	
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	
DCF - CV ESG HP 2020-2021	3	11/10/2021				Jewish Family & Community Services	11/10/2021

Figure 4-35 – Client Dashboard

Edit Client: Folder

The “Edit Client” folder menu option on the “Client Workspace” provides in-depth non-program related historical information that pertains to the client such as past addresses, any emergency contacts, past case managers, etc.



Tips and Tricks - *Editing Client Information*

- HMIS is designed to cut down on the amount of time data collection takes. The main way it accomplishes this is that data is shared across agencies. One of the main objectives of this feature is to prevent a client from having to provide their history and personal information to every agency that they visit for services or other assistance. The ability to share data also means that in some instances, it is possible to delete or alter data that should not be deleted or altered. In the sections that follow, directions for how to ensure accurate data without deleting or altering essential data is provided.

Figure 4-36.T9 – Editing Client Information

Client Information

A client’s “Universal Identifier Elements” is shared by all organizations participating in HMIS. It is collected in the “Basic Client Information” form (see below), and includes the following:

Basic Client Information and Demographics

- First Name
- Last Name
- Name Quality
- Social Security Number
- SSN Quality
- Birth Date
- DOB Quality
- Ethnicity
- Race

- Gender
- Veteran Status
- Relationship to Head of Household

Steps to Navigate to the "Edit Client" Folder Menu

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".***

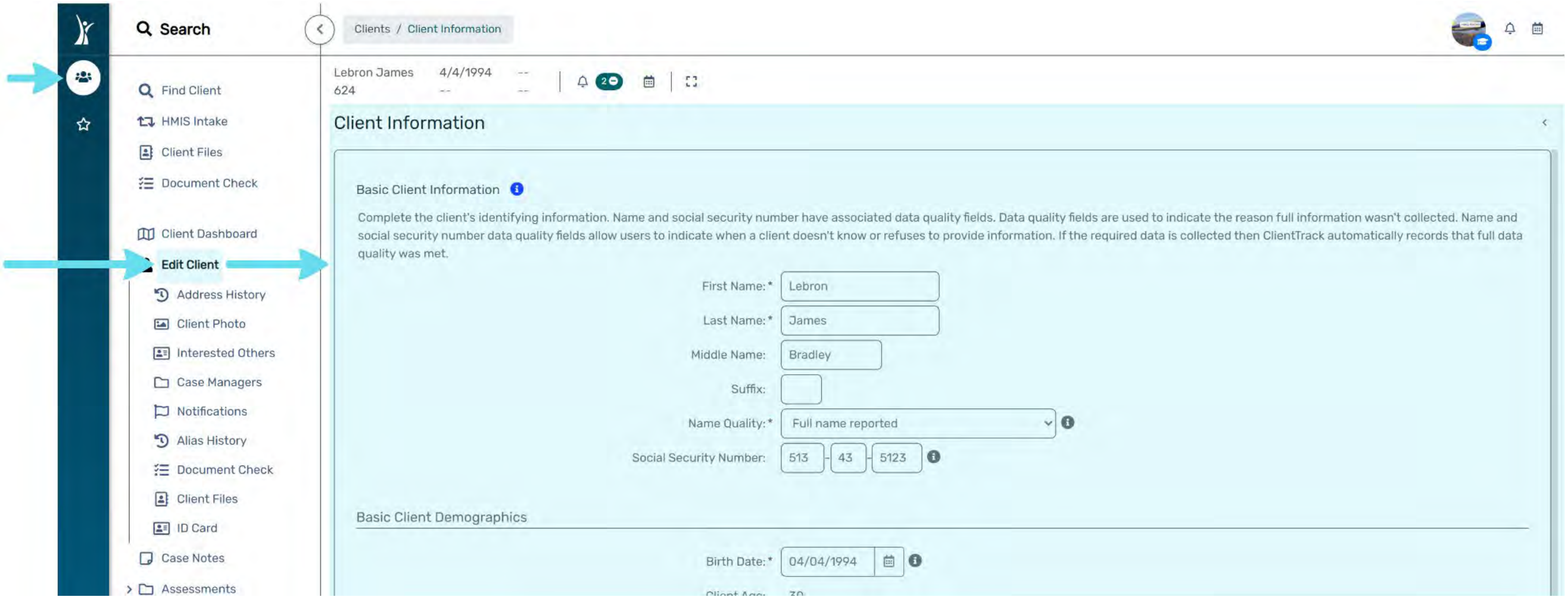
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".*

*** 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 "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" folder.

**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 James 4/4/1994 --
624 -- --

Client Information

Basic Client Information

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

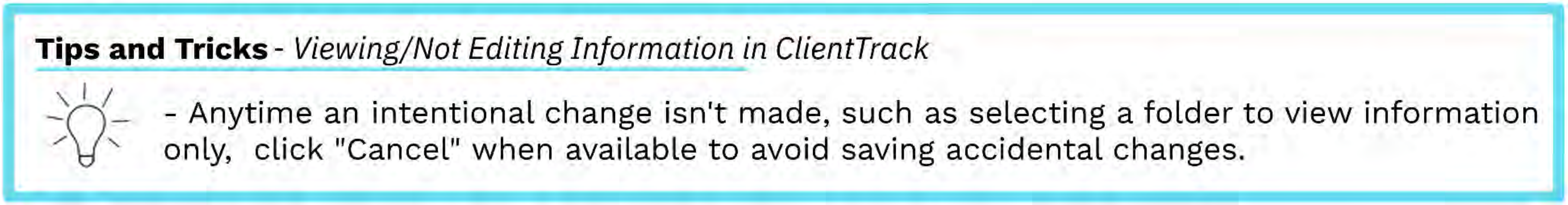
First Name: * Lebron
Last Name: * James
Middle Name: Bradley
Suffix:
Name Quality: * Full name reported
Social Security Number: 513 - 43 - 5123

Basic Client Demographics

Birth Date: * 04/04/1994

Figure 4-37 – Edit Client – Client Information

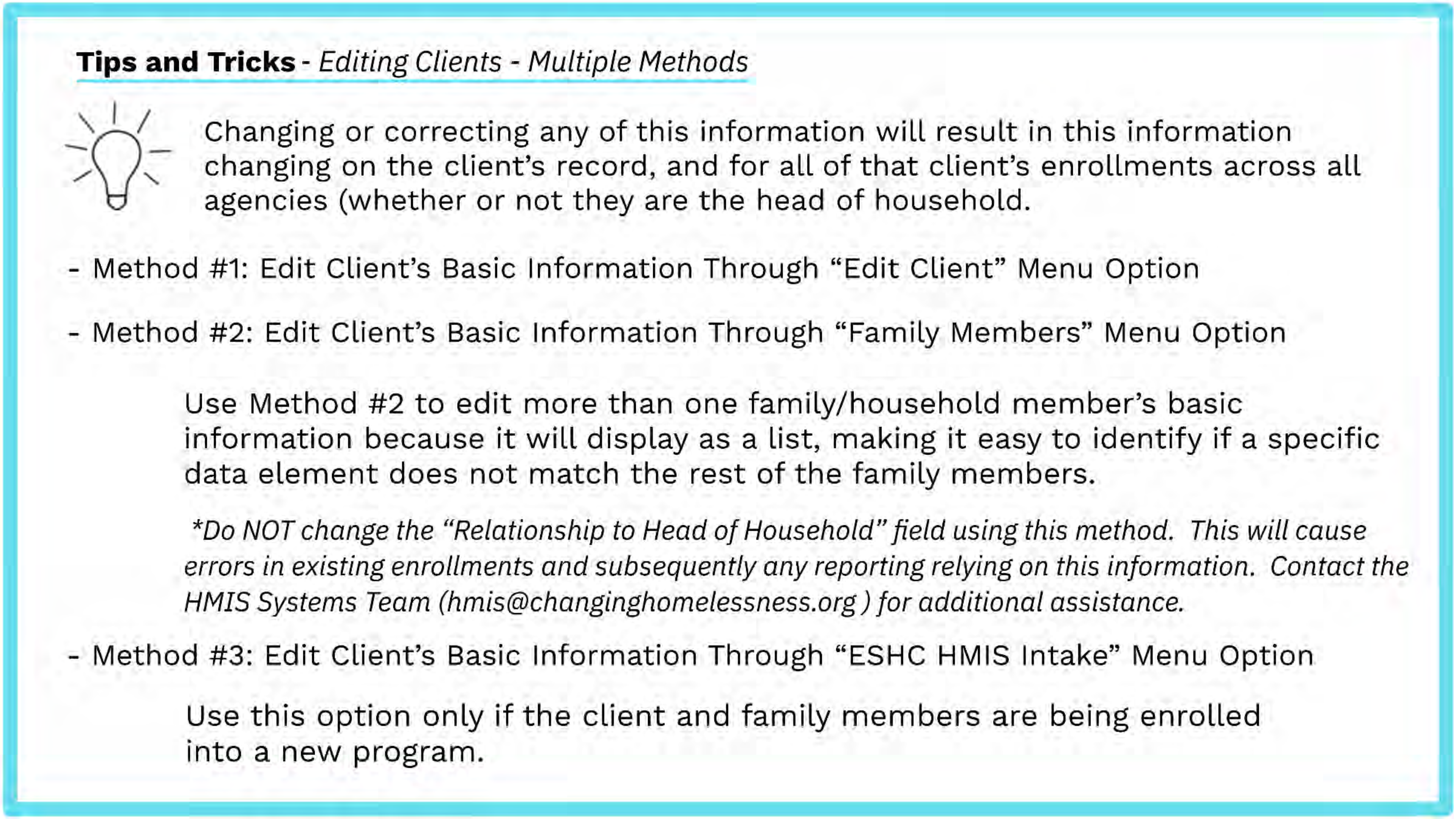
Accessing/Editing Client's Basic Information



Tips and Tricks - *Viewing/Not Editing Information in ClientTrack*

- Anytime an intentional change isn't made, such as selecting a folder to view information only, click "Cancel" when available to avoid saving accidental changes.

Figure 4-38 – Tips and Tricks – Viewing/Not Editing Information in ClientTrack



Tips and Tricks - *Editing Clients - Multiple Methods*

Changing or correcting any of this information will result in this information changing on the client's record, and for all of that client's enrollments across all agencies (whether or not they are the head of household.

- Method #1: Edit Client's Basic Information Through "Edit Client" Menu Option

- Method #2: Edit Client's Basic Information Through "Family Members" Menu Option

  Use Method #2 to edit more than one family/household member's basic information because it will display as a list, making it easy to identify if a specific data element does not match the rest of the family members.

  **Do NOT change the "Relationship to Head of Household" field using this method. This will cause errors in existing enrollments and subsequently any reporting relying on this information. Contact the HMIS Systems Team (hmis@changinghomelessness.org) for additional assistance.*

- Method #3: Edit Client's Basic Information Through "ESHC HMIS Intake" Menu Option

  Use this option only if the client and family members are being enrolled into a new program.

Figure 4-39 – Tips and Tricks – Editing Clients – Multiple Methods

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”.*

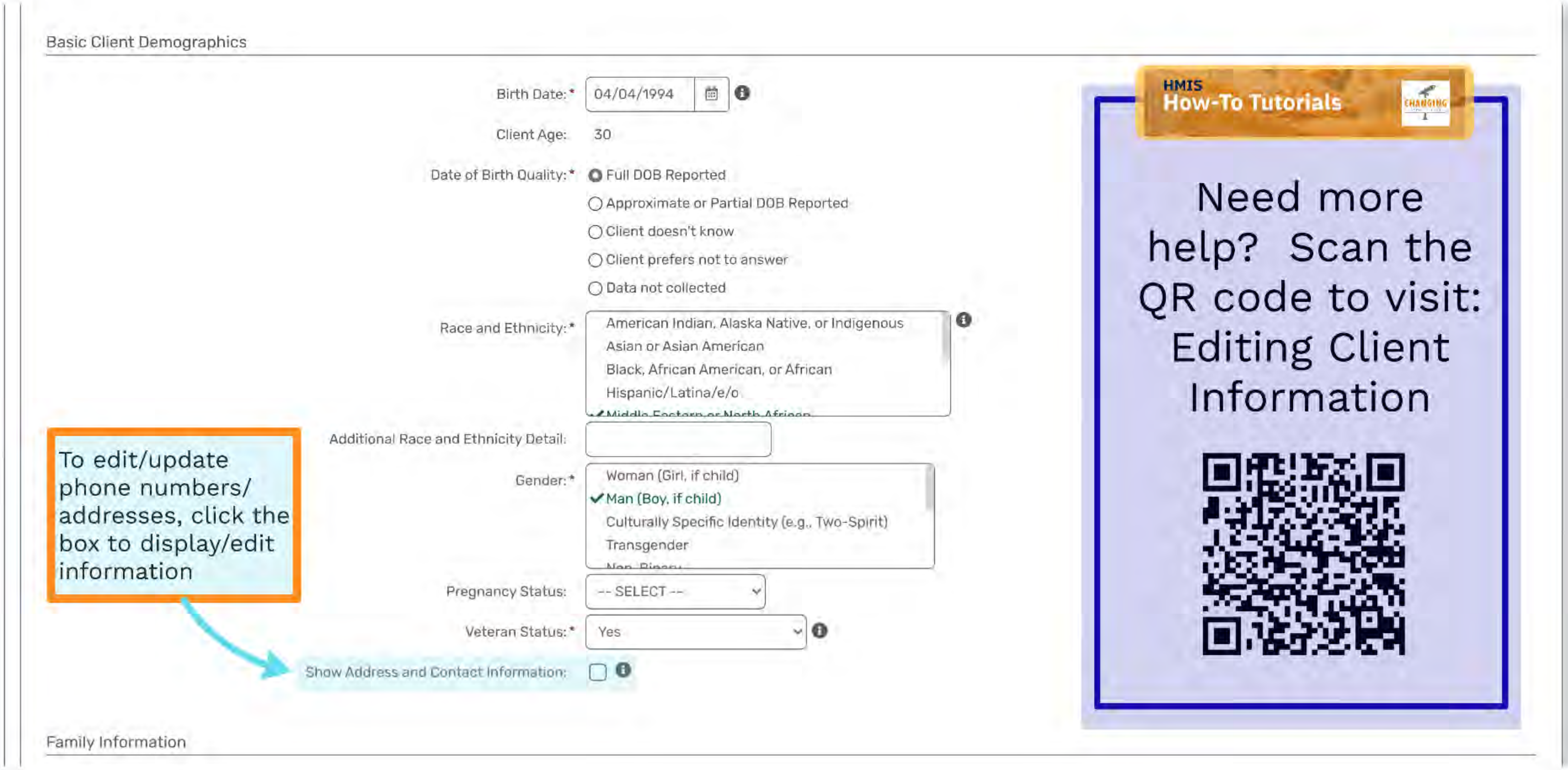
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Edit Client” secondary sidebar* menu option. ClientTrack will navigate to the “Client Information” 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”.*

Tips and Tricks - *Editing Client Address and Contact Information*

- To view/edit Client Address and Contact Information, click the “Show Address and Contact Information:” checkbox.



Basic Client Demographics

Birth Date:* 04/04/1994

Client Age: 30

Date of Birth Quality:*
- ● Full DOB Reported
- ○ Approximate or Partial DOB Reported
- ○ Client doesn't know
- ○ Client prefers not to answer
- ○ Data not collected

Race and Ethnicity:*
- American Indian, Alaska Native, or Indigenous
- Asian or Asian American
- Black, African American, or African
- Hispanic/Latina/e/o
- ✓ Middle Eastern or North African

Additional Race and Ethnicity Detail:

Gender:*
- Woman (Girl, if child)
- ✓ Man (Boy, if child)
- Culturally Specific Identity (e.g., Two-Spirit)
- Transgender
- Non-Binary

Pregnancy Status: -- SELECT --

Veteran Status:* Yes

Show Address and Contact Information: ☐

Family Information

To edit/update phone numbers/ addresses, click the box to display/edit information

Need more help? Scan the QR code to visit: Editing Client Information

Figure 4-40.QR – Tips and Tricks – Editing Client Addresses and Client Information

Tips and Tricks - *Editing Client Address and Contact Information*

- To view/edit Client Address and Contact Information, click the “Show Address and Contact Information:” checkbox.

Client Information

Gender:* Woman (Girl, if child)
✓ Man (Boy, if child)
Culturally Specific Identity (e.g., Two-Spirit)
Transgender
Non-Binary

Veteran Status:* Yes

Show Address and Contact Information: ☑

Contact Information

Address: Behind walmart on 103rd

Address 2:

City, State, Zip Code: City State Zip Code

Email: ljames@nba.com

Home Phone: 904-555-8458

Work Phone:

Msg Phone:

Family Information

Use this section to collect data about a client's family. The Family search field allows you to search for and select an existing family account. This is appropriate when adding a family member to an existing family.

To edit/update phone numbers/ addresses, click the box to display/edit information

HMIS How-To Tutorials

Need more help? Scan the QR code to visit: Editing Client Information

Figure 4-41.QR – Tips and Tricks – Editing Client Addresses and Client Information

Step 3: Edit information as applicable. Click “Finish” to save changes. Click Cancel to exit without saving. ClientTrack will navigate to the “Client Dashboard” workspace container.

Address History: Subfolder

The “Address History” page will keep track of each address associated with the client. It pulls this data from the “Basic Client Information” form (to access, click on the “Edit Client” menu option), and the “Universal Data Assessment”.

The information captured in the “Address History” section is the following:

- Address
- City
- State
- Zip
- Home Phone
- Begin Date (will automatically populate)
- End Date (will automatically populate)

Steps to Navigate to the “Address History” Subfolder Menu

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”.*

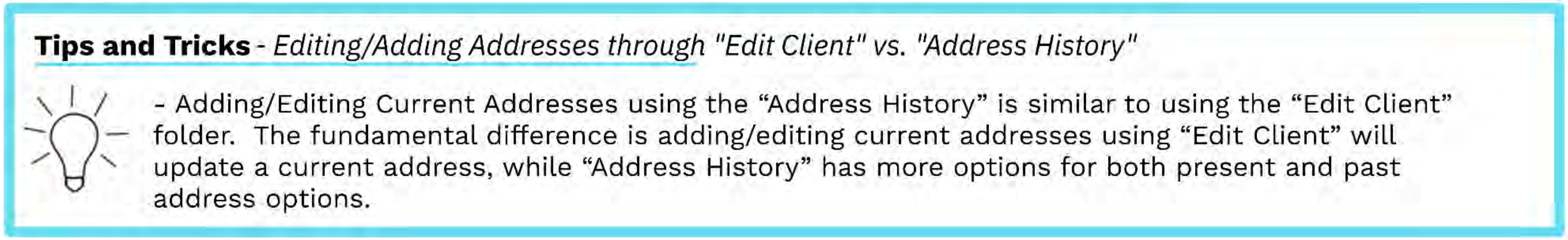
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Edit Client” secondary sidebar* menu option. ClientTrack will navigate to the “Client Information” workspace container, and a dropdown menu will appear under the “Edit Client” folder.

**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”.*

Step 3: Select the “Address History” secondary sidebar menu option. ClientTrack will navigate to the “Address History” workspace container.

Adding an Address to the “Address History” Subfolder Menu



Tips and Tricks - *Editing/Adding Addresses through "Edit Client" vs. "Address History"*

- Adding/Editing Current Addresses using the “Address History” is similar to using the “Edit Client” folder. The fundamental difference is adding/editing current addresses using “Edit Client” will update a current address, while “Address History” has more options for both present and past address options.

Figure 4-42 – Tips and Tricks – – Editing/Adding Addresses through “Edit Client” vs. “Address History”

Adding/Editing Current Addresses using the “Edit Client” folder

To edit/add current addresses using the “Edit Client” folder instead of the “Address History” folder, navigate to Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Edit Client/Accessing/Editing Client’s Basic Information in the “HMIS Basic User 2025 Manual”.

Each time this information is changed or edited; a new record will appear on this page with the most recent address entered becoming the “Current Mailing” address. Any older addresses entered will be labeled “Previous Mailing” by default.

Steps to Adding an Address to the “Address History” Subfolder Menu

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".*

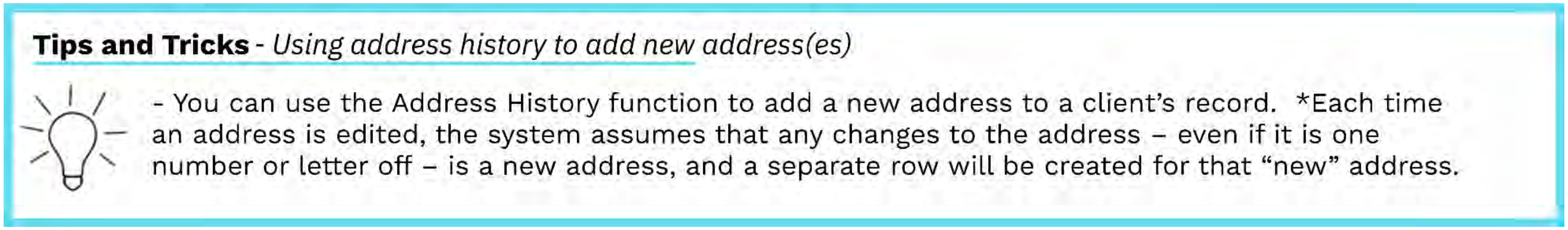
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

Step 2: Select the "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" folder.

**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".*

Step 3: Select the "Address History" from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the "Address History" workspace container.

To view addresses, stop at Step 3. To add/edit addresses, continue to Step 4.

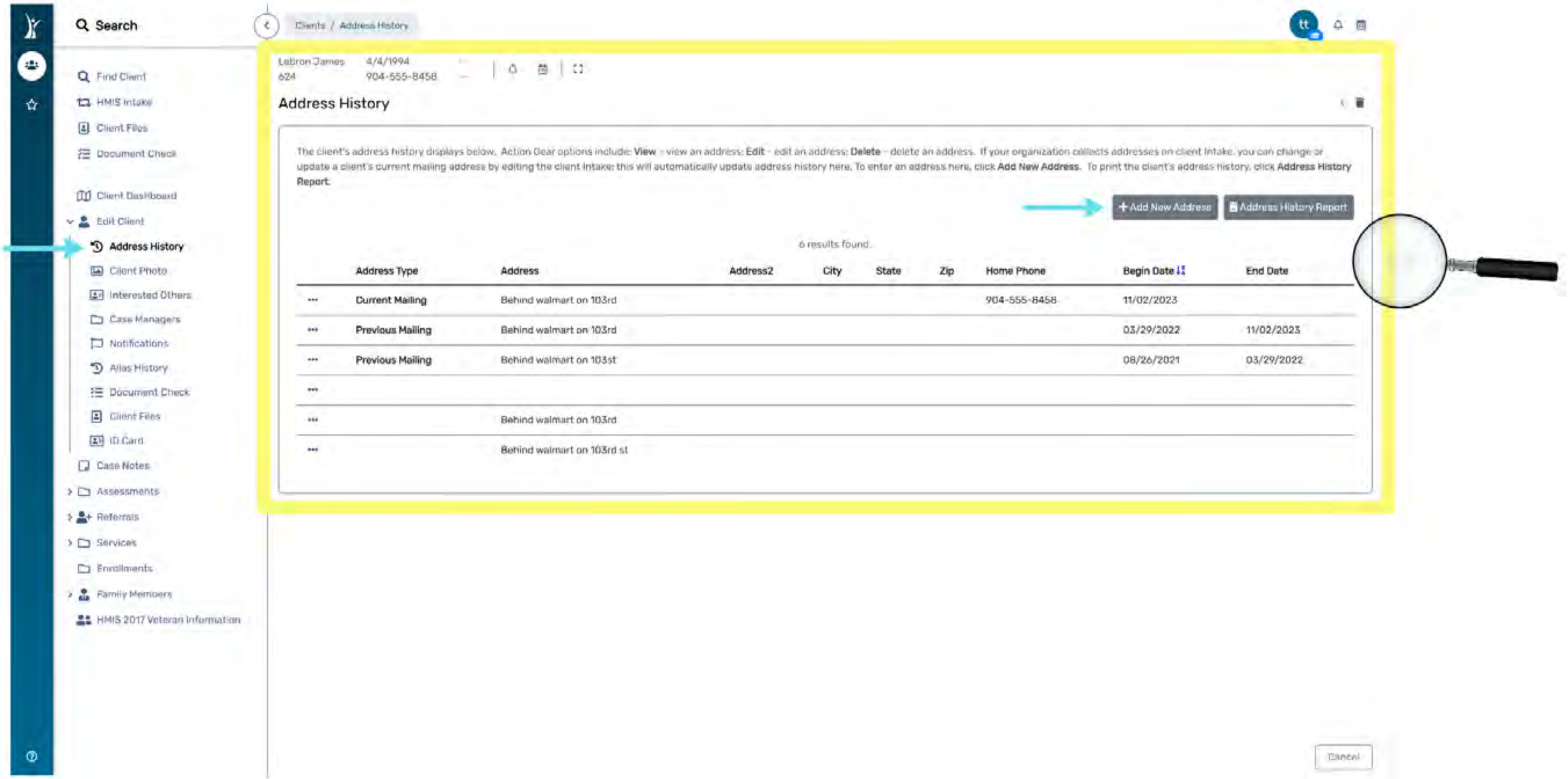


Tips and Tricks - *Using address history to add new address(es)*

- You can use the Address History function to add a new address to a client's record. *Each time an address is edited, the system assumes that any changes to the address – even if it is one number or letter off – is a new address, and a separate row will be created for that "new" address.

Figure 4-43 – Tips and Tricks – Using Address History to Add New Address(es)

Step 4: To add/edit addresses, click the “Add New Address” button.



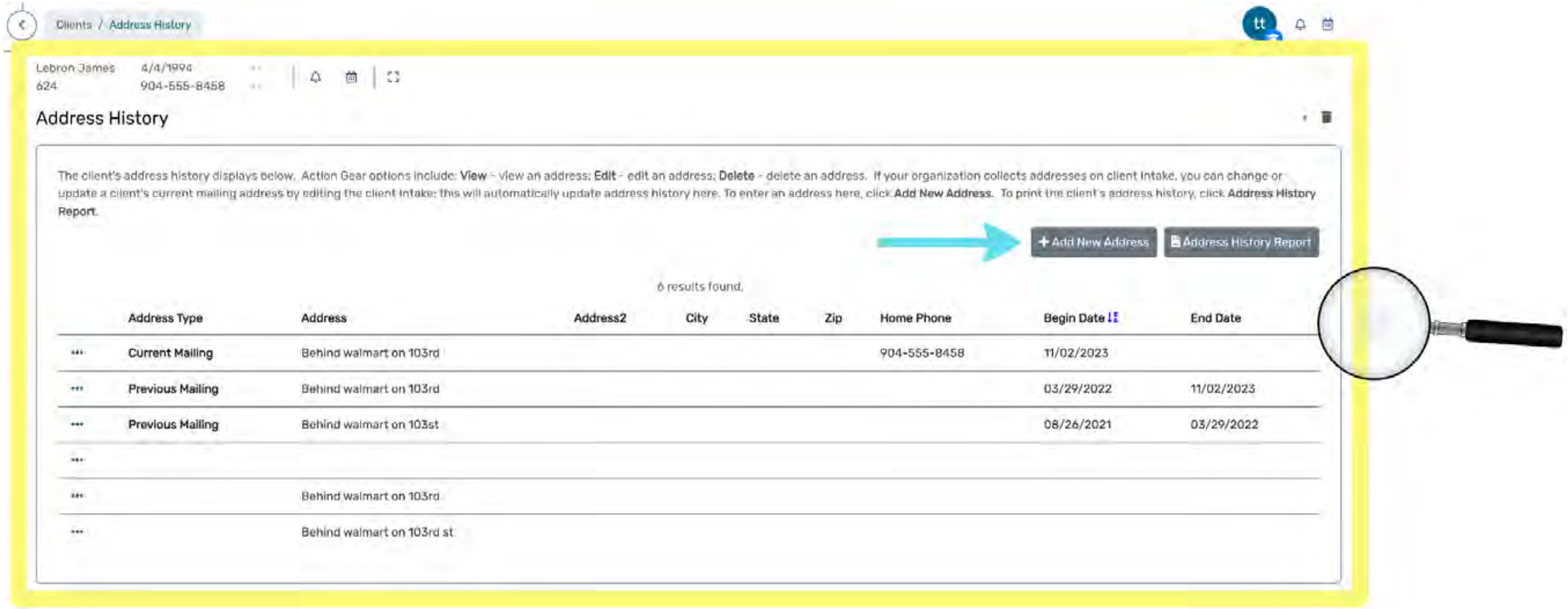
Address History

The client's address history displays below. Action Gear options include: **View** - view an address; **Edit** - edit an address; **Delete** - delete an address. If your organization collects addresses on client Intake, you can change or update a client's current mailing address by editing the client Intake; this will automatically update address history here. To enter an address here, click **Add New Address**. To print the client's address history, click **Address History Report**.

6 results found.

	Address Type	Address	Address2	City	State	Zip	Home Phone	Begin Date	End Date
•••	Current Mailing	Behind walmart on 103rd					904-555-8458	11/02/2023	
•••	Previous Mailing	Behind walmart on 103rd						03/29/2022	11/02/2023
•••	Previous Mailing	Behind walmart on 103st						08/26/2021	03/29/2022
•••									
•••		Behind walmart on 103rd							
•••		Behind walmart on 103rd st							

Figure 4-44 – Add New Address History



Address History

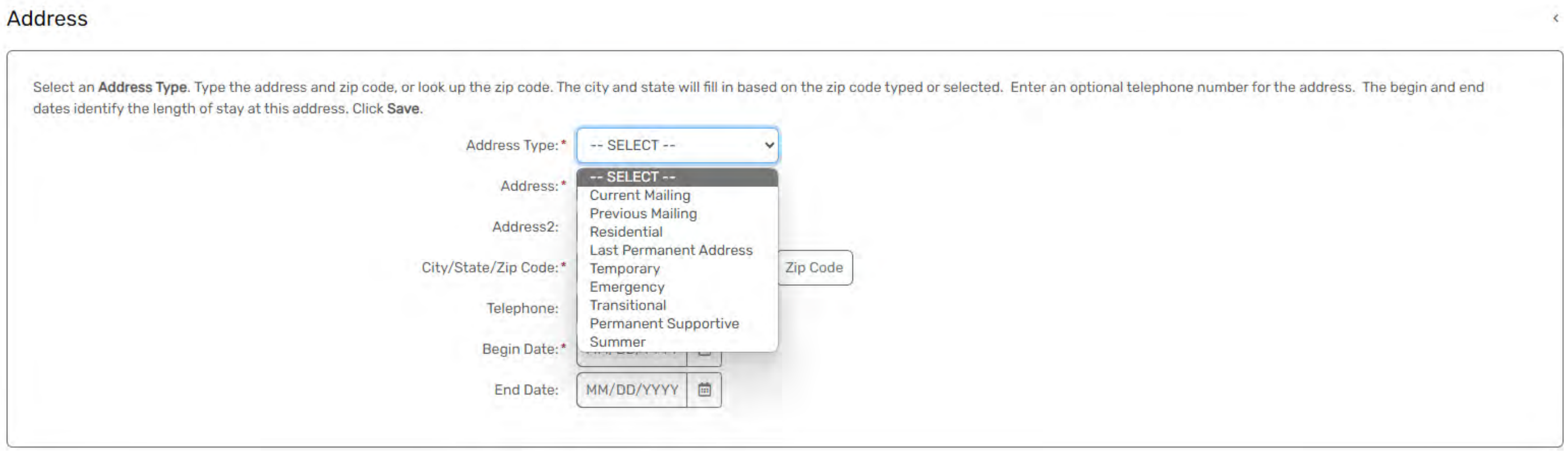
The client's address history displays below. Action Gear options include: **View** - view an address; **Edit** - edit an address; **Delete** - delete an address. If your organization collects addresses on client intake, you can change or update a client's current mailing address by editing the client intake; this will automatically update address history here. To enter an address here, click **Add New Address**. To print the client's address history, click **Address History Report**.

6 results found.

	Address Type	Address	Address2	City	State	Zip	Home Phone	Begin Date	End Date
•••	Current Mailing	Behind walmart on 103rd					904-555-8458	11/02/2023	
•••	Previous Mailing	Behind walmart on 103rd						03/29/2022	11/02/2023
•••	Previous Mailing	Behind walmart on 103st						08/26/2021	03/29/2022
•••									
•••		Behind walmart on 103rd							
•••		Behind walmart on 103rd st							

Figure 4-45.z - – Add New Address History

Step 5: Complete the applicable information. Required elements are marked with a (*).



Select an **Address Type**. Type the address and zip code, or look up the zip code. The city and state will fill in based on the zip code typed or selected. Enter an optional telephone number for the address. The begin and end dates identify the length of stay at this address. Click **Save**.

Figure 4-46 – Add New Address History Form

Step 6: Click “Save” at the bottom right side of the page when all applicable information is completed. ClientTrack will navigate to the “Address History” workspace container where the recorded address will be visible.

Client Photo : Subfolder

The “Client Photo” subfolder menu option gives users the ability to add a picture of the client to their client record to assist in identifying the correct client record. ClientTrack puts a limit on adding one photo to the client’s record at any time. This means that if a new photo is uploaded to a client’s record and there is an existing photo already, the new photo will replace the old one. Since these photos are sometimes used to generate the Client ID Cards for meal lines, etc., it is best to change the photo only when necessary.

<u>Steps to Navigate to the “Client Photo” Subfolder Menu</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 "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" folder.

**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".*

Step 3: Select the "Client Photo" subfolder from the dropdown on the secondary sidebar menu option. A "Photo" pop-up window will appear.

Adding a Client Photo

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”.*

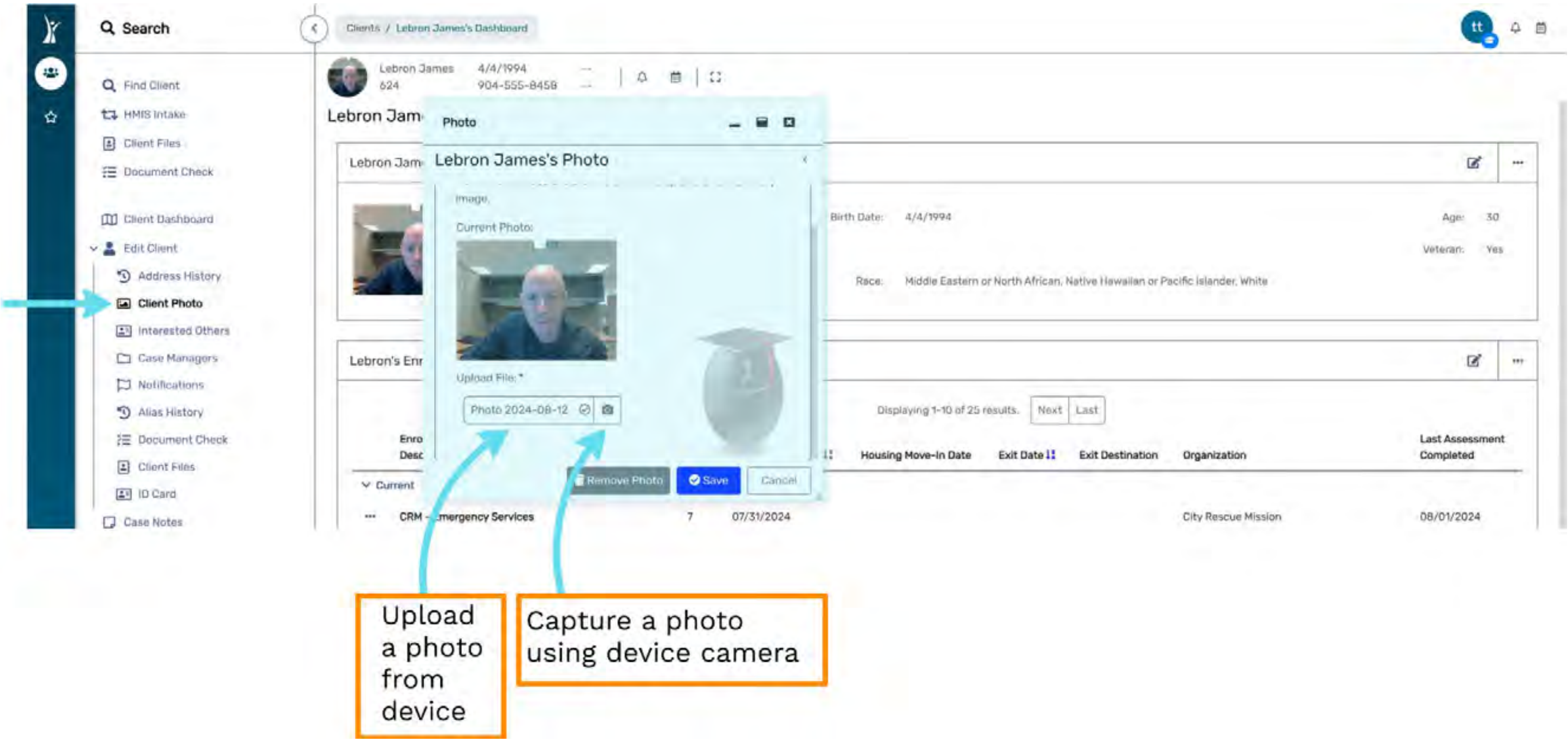
Step 2: Select the “Edit Client” secondary sidebar* menu option. ClientTrack will navigate to the “Client Information” workspace container, and a dropdown menu will appear under the “Edit Client” folder.

**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”.*

Step 3: Select the “Client Photo” subfolder from the dropdown on the secondary sidebar menu option. A “Photo” pop-up window will appear.

Step 4: Click on the “Choose file” to add a file or click the camera icon* to use device to capture an image.

**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”.*



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

Birth Date: 4/4/1994

Age: 30

Veteran: Yes

Race: Middle Eastern or North African, Native Hawaiian or Pacific Islander, White

Upload File: Photo 2024-08-12

Displaying 1-10 of 25 results.

Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
CRM - Emergency Services 7 07/31/2024			City Rescue Mission	08/01/2024

Figure 4-47 – Uploading a Client Photo

Step 5: Click “Save” to save/update photo or click cancel or the exit icon in the top right to close the screen without saving.

Interested Others: Subfolder

The “Interested Others” menu option provides a way to document emergency contacts or other people that the client has agreed that agencies may contact in specific cases. This could be a guardian, a friend, a spouse or another service provider not in HMIS (the VA for example). Best practice is to make sure written consent is uploaded/on file of the client to connect with any interested others to communicate any information regarding the client. Please consult with your supervisor and/or program rules or reach out to hmis@changinghomelessness.org for further information.

Steps to Navigate to the “Interested Others” Subfolder Menu

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 “Edit Client” secondary sidebar* menu option. ClientTrack will navigate to the “Client Information” workspace container, and a dropdown menu will appear under the “Edit Client” folder.

**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”.*

Step 3: Select the "Interested Others" subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the "Interested Other" workspace container.

Adding an Interested Others

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".*

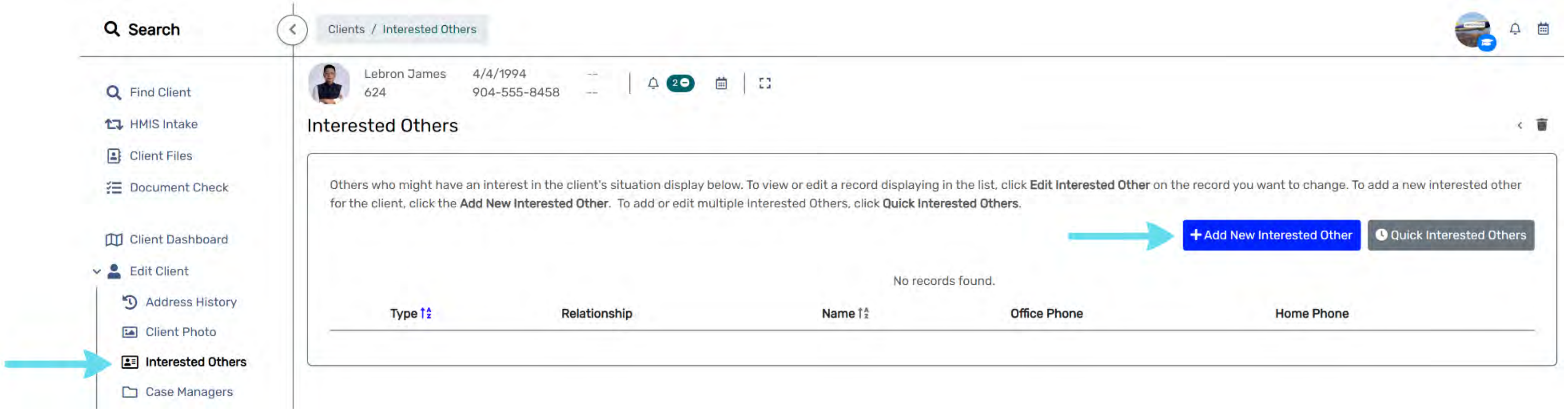
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

Step 2: Select the "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" folder.

**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".*

Step 3: Select the "Interested Others" subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the "Interested Other" workspace container.

Step 4: Click "Add New Interested Others". ClientTrack will navigate to the "Interested Others"

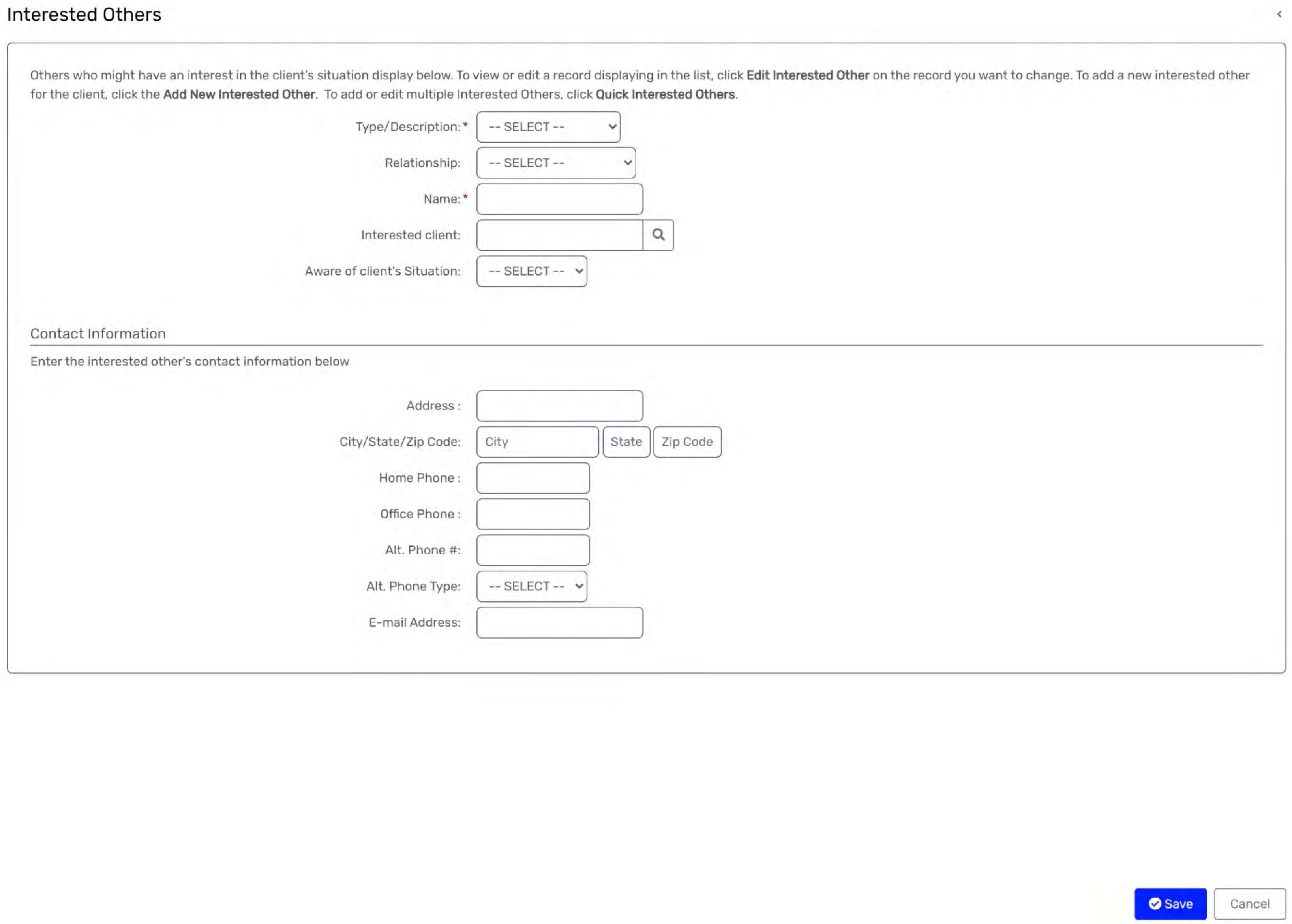


Others who might have an interest in the client's situation display below. To view or edit a record displaying in the list, click **Edit Interested Other** on the record you want to change. To add a new interested other for the client, click the **Add New Interested Other**. To add or edit multiple interested Others, click **Quick Interested Others**.

No records found.

Figure 4-48 - Add New Interested Other

Step 4: Complete all applicable fields. Required elements are marked with a (*).



Interested Others

Others who might have an interest in the client's situation display below. To view or edit a record displaying in the list, click **Edit Interested Other** on the record you want to change. To add a new interested other for the client, click the **Add New Interested Other**. To add or edit multiple Interested Others, click **Quick Interested Others**.

Type/Description:* -- SELECT --

Relationship: -- SELECT --

Name:*

Interested client:

Aware of client's Situation: -- SELECT --

Contact Information

Enter the interested other's contact information below

Address :

City/State/Zip Code: City State Zip Code

Home Phone :

Office Phone :

Alt. Phone #:

Alt. Phone Type: -- SELECT --

E-mail Address:

Figure 4-49 – Add New Interested Other Form

Step 5: Click “Save” to save applicable information. Click “Cancel” to exit without saving.

Case Managers: Subfolder

The “Case Managers” menu option lists any Case Managers that are currently working with or previously worked with the client. When enrolled, the workflow only allows for one case manager assignment per enrollment.

Steps to Navigate to the “Case Managers” Subfolder Menu

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”.*

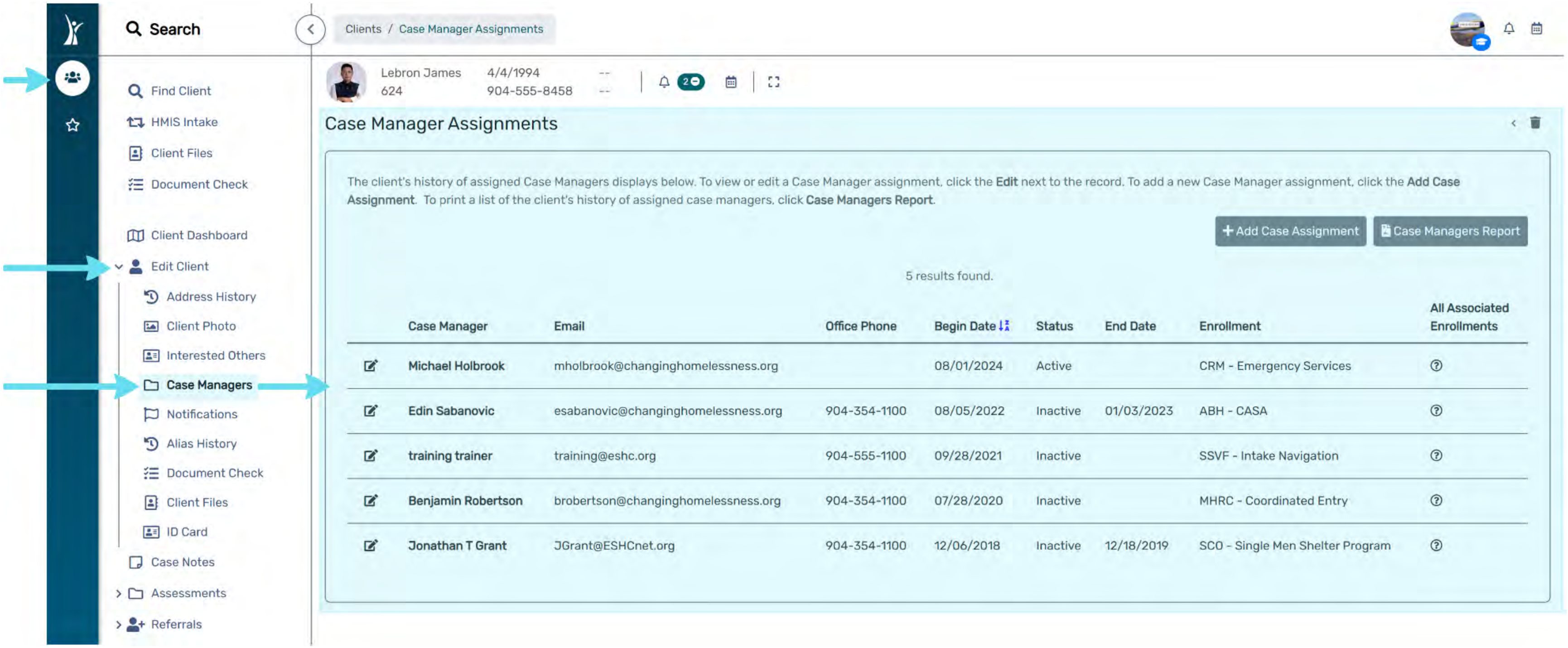
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** 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 “Edit Client” secondary sidebar* menu option. ClientTrack will navigate to the “Client Information” workspace container, and a dropdown menu will appear under the “Edit Client” folder.

**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”.*

Step 3: Select the “Case Managers” subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the “Case Manager Assignment” workspace container.



Case Manager Assignments

The client's history of assigned Case Managers displays below. To view or edit a Case Manager assignment, click the **Edit** next to the record. To add a new Case Manager assignment, click the **Add Case Assignment**. To print a list of the client's history of assigned case managers, click **Case Managers Report**.

5 results found.

Case Manager	Email	Office Phone	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
Michael Holbrook	mholbrook@changinghomelessness.org		08/01/2024	Active		CRM - Emergency Services	?
Edin Sabanovic	esabanovic@changinghomelessness.org	904-354-1100	08/05/2022	Inactive	01/03/2023	ABH - CASA	?
training trainer	training@eshc.org	904-555-1100	09/28/2021	Inactive		SSVF - Intake Navigation	?
Benjamin Robertson	brobertson@changinghomelessness.org	904-354-1100	07/28/2020	Inactive		MHRC - Coordinated Entry	?
Jonathan T Grant	JGrant@ESHCnet.org	904-354-1100	12/06/2018	Inactive	12/18/2019	SCO - Single Men Shelter Program	?

Figure 4-50 – Case Managers Folder

Updating or Transferring Case Manager Assignments

Use the “Edit Case Assignment” to edit/update case management assignments. This will have the effect of transferring the case assignment to the new Case Manager.

** For information regarding the Case Manager subfolder, go to Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Edit Client/Case Managers: Subfolder in the “HMIS Basic User 2025 Manual”.*

Steps to Transfer Case Managers in the “Case Managers” Subfolder Menu

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”.*

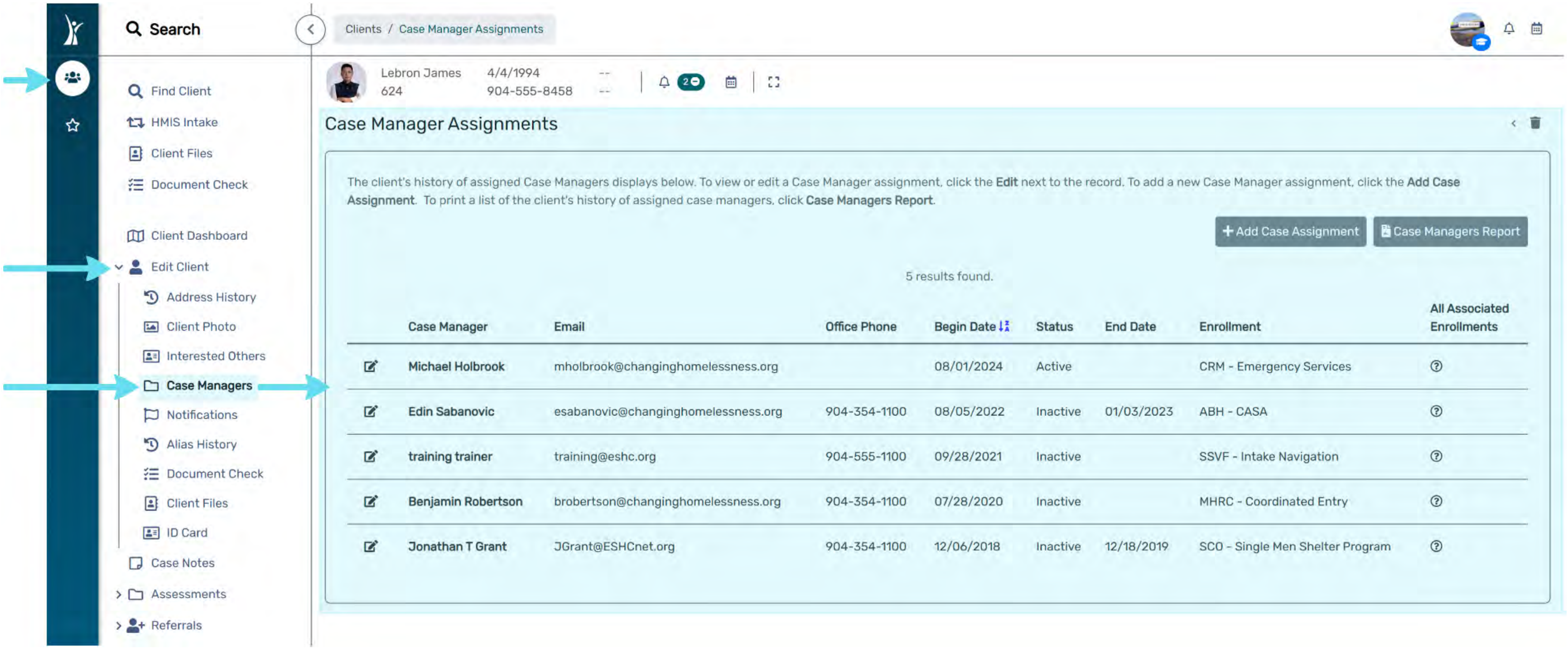
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** 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 “Edit Client” secondary sidebar* menu option. ClientTrack will navigate to the “Client Information” workspace container, and a dropdown menu will appear under the “Edit Client” folder.

** 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”.*

Step 3: Select the “Case Managers” subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the “Case Manager Assignment” workspace container.



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

Case Manager Assignments

The client's history of assigned Case Managers displays below. To view or edit a Case Manager assignment, click the **Edit** next to the record. To add a new Case Manager assignment, click the **Add Case Assignment**. To print a list of the client's history of assigned case managers, click **Case Managers Report**.

5 results found.

Case Manager	Email	Office Phone	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
Michael Holbrook	mholbrook@changinghomelessness.org		08/01/2024	Active		CRM - Emergency Services	?
Edin Sabanovic	esabanovic@changinghomelessness.org	904-354-1100	08/05/2022	Inactive	01/03/2023	ABH - CASA	?
training trainer	training@eshc.org	904-555-1100	09/28/2021	Inactive		SSVF - Intake Navigation	?
Benjamin Robertson	brobertson@changinghomelessness.org	904-354-1100	07/28/2020	Inactive		MHRC - Coordinated Entry	?
Jonathan T Grant	JGrant@ESHCnet.org	904-354-1100	12/06/2018	Inactive	12/18/2019	SCO - Single Men Shelter Program	?

Figure 4-51 – Case Managers Folder

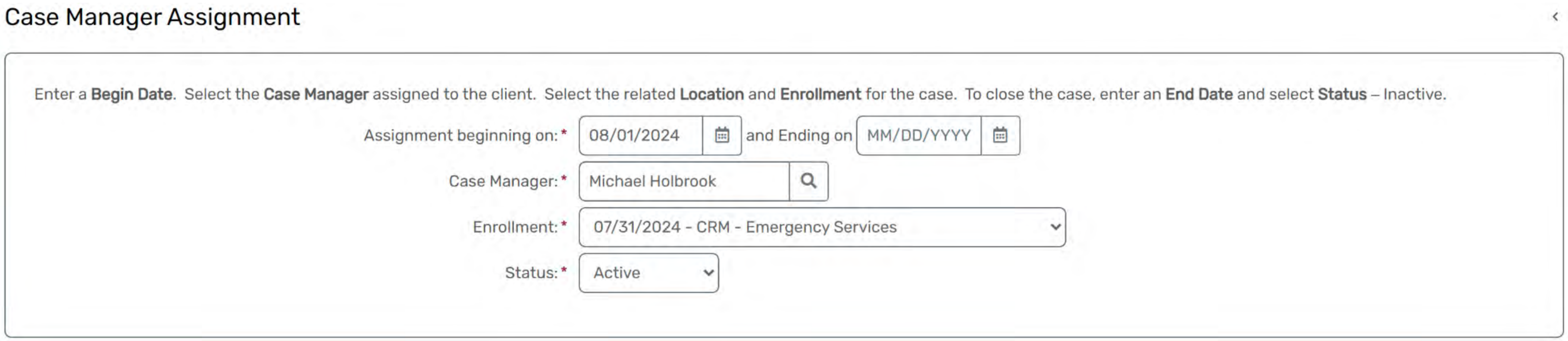
Step 4: Find the Case Manager Assignment that needs to be updated and click the edit button*.

**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".*

	Case Manager	Email	Office Phone	Begin Date	Status	End Date	Enrollment	Enrollments
	Michael Holbrook	mholbrook@changinghomelessness.org		08/01/2024	Active		CRM - Emergency Services	ⓘ
	Edin Sabanovic	esabanovic@changinghomelessness.org	904-354-1100	08/05/2022	Inactive	01/03/2023	ABH - CASA	ⓘ

Figure 4-52 – Edit Case Manager Assignment

Step 5: On the "Case Manager Assignment" workspace container form, edit the box after "and Ending on" to reflect the end date of the current case manager's assignment with the client. Select the "Status" to "Inactive". Click "Save" to save or click "Exit" to exit without saving. ClientTrack will navigate to the "Case Manager Assignments" workspace container. An updated list with any edits/changes will be visible.



Case Manager Assignment

Enter a **Begin Date**. Select the **Case Manager** assigned to the client. Select the related **Location** and **Enrollment** for the case. To close the case, enter an **End Date** and select **Status** – Inactive.

Assignment beginning on: * 08/01/2024 and Ending on MM/DD/YYYY

Case Manager: * Michael Holbrook

Enrollment: * 07/31/2024 - CRM - Emergency Services

Status: * Active

Figure 4-53 – Case Manager Assignment Form

Step 6: To add a new case manager assignment, click the "Add Case Assignment" button. ClientTrack will navigate to the "Case Manager Assignment" workspace container form. ClientTrack will default the case assignment begin date as the current date, but this date is editable if applicable by selecting and typing/replacing the text in the box.

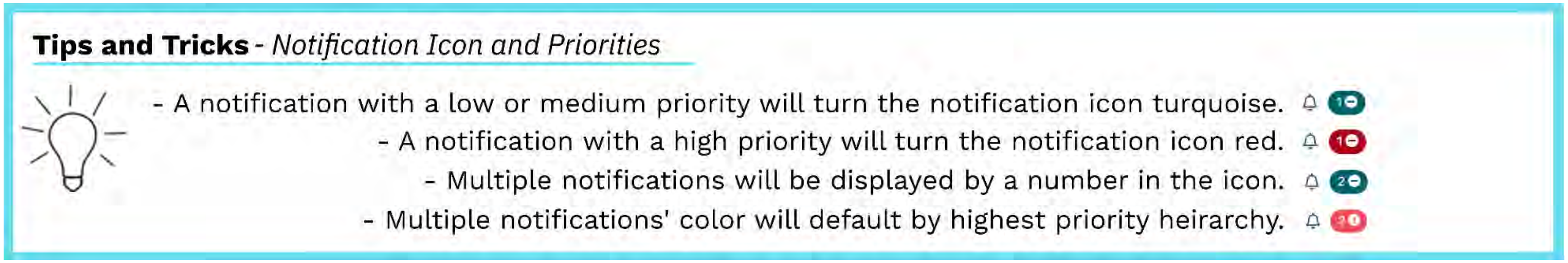
Step 7: Client Track will default the “Case Manager” assignment to the currently signed in user. To edit when applicable, click in the “Case Manager” field and start typing the new case manager’s name or click on the magnifying glass. A pop-up window will allow a search for existing case managers in the system. Select or type in the new case manager’s name into the “Case Manager” field. Select “Save” to save changes or select “Cancel” to exit without saving. ClientTrack will navigate to the “Case Managers Assignments” workspace container.

(Client) Notifications: Subfolder

Client notifications in ClientTrack allows important information to be featured on a notification bell icon* visible on the client’s “Client Workspace” entity bar**.

**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 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 - *Notification Icon and Priorities*

- A notification with a low or medium priority will turn the notification icon turquoise.
- A notification with a high priority will turn the notification icon red.
- Multiple notifications will be displayed by a number in the icon.
- Multiple notifications' color will default by highest priority heirarchy.

Figure 4-54 – Tips and Tricks – Notification Icon and Priorities

Steps to Navigate to the "Notifications" Subfolder Menu

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 "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" folder.

**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".*

Step 3: Select the "Notifications" subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the "Notifications / Alerts" page.

Viewing Client Notifications

There are two ways to view existing Notifications in a client's record.

Method #1: Viewing Client Notifications through the Notification Bell Icon

Method #2: Viewing Client Notifications through the Edit Client Menu

Viewing Client Notifications through the Notification Bell Icon

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: Click on the notification bell icon* visible on the client's "Client Workspace" entity bar**.

**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 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".*

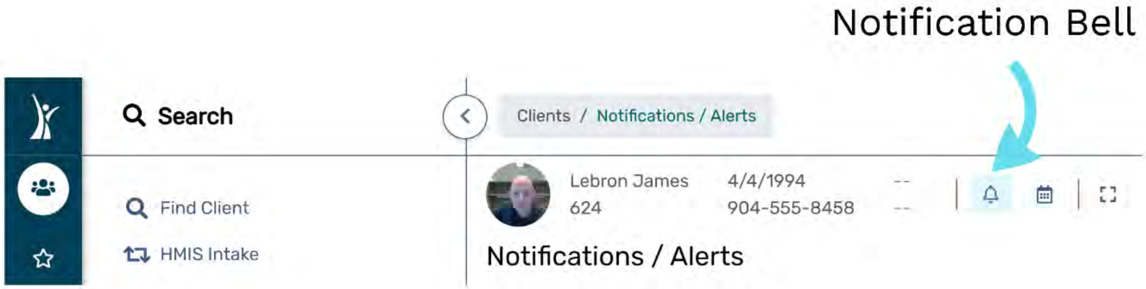
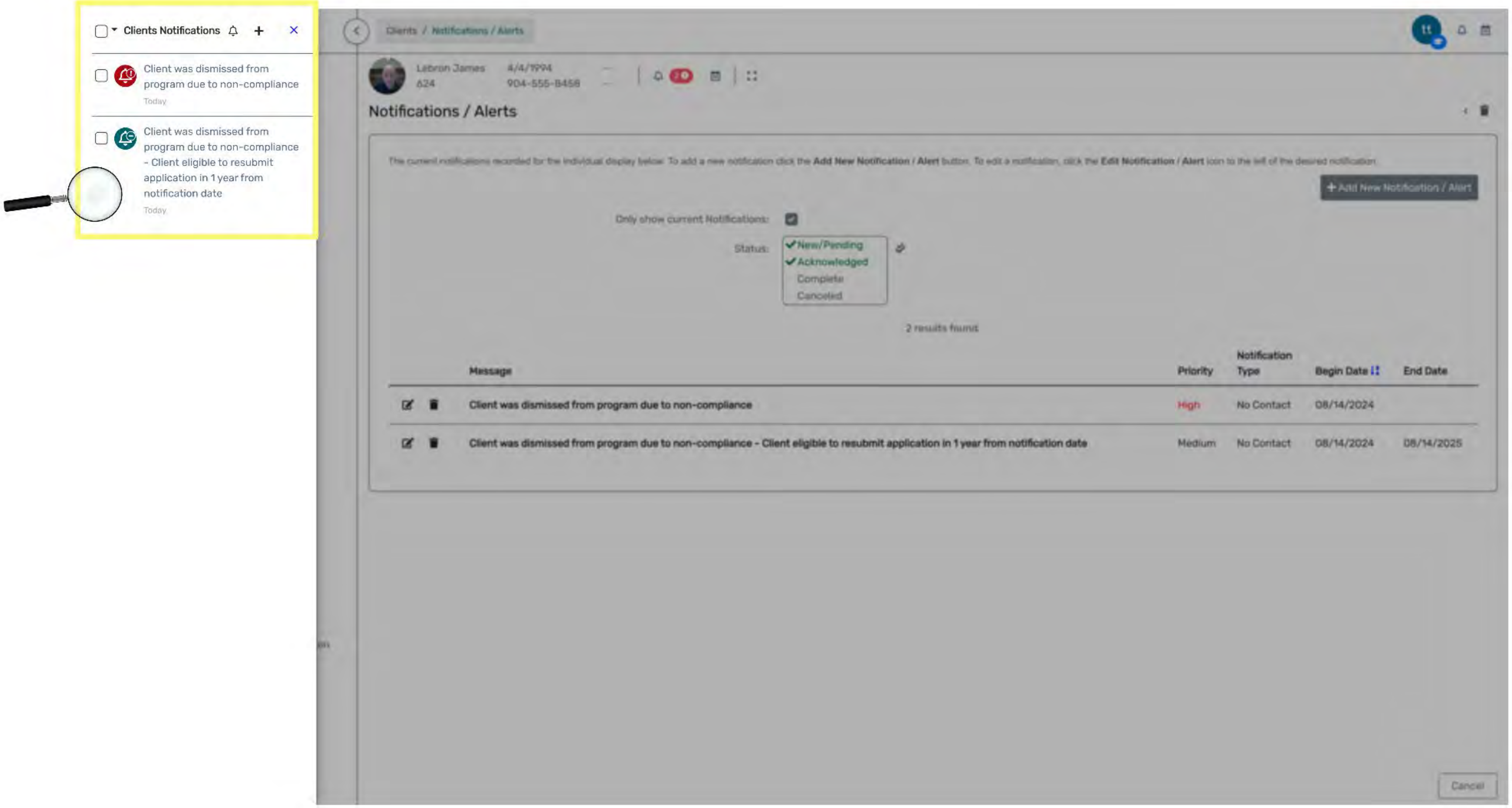


Figure 4-55 – Entity Bar Notification Bell

Step 3: A call-out window will display any notifications created by clicking on the bell. To view all notifications, click on the notification bell icon in the call-out window.



☐ **Clients Notifications**

Client was dismissed from program due to non-compliance

Today

Client was dismissed from program due to non-compliance – Client eligible to resubmit application in 1 year from notification date

Today

Clients / Notifications / Alerts

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

Notifications / Alerts

The current notifications recorded for the individual display below. To add a new notification click the **Add New Notification / Alert** button. To edit a notification, click the **Edit Notification / Alert** icon to the left of the desired notification.

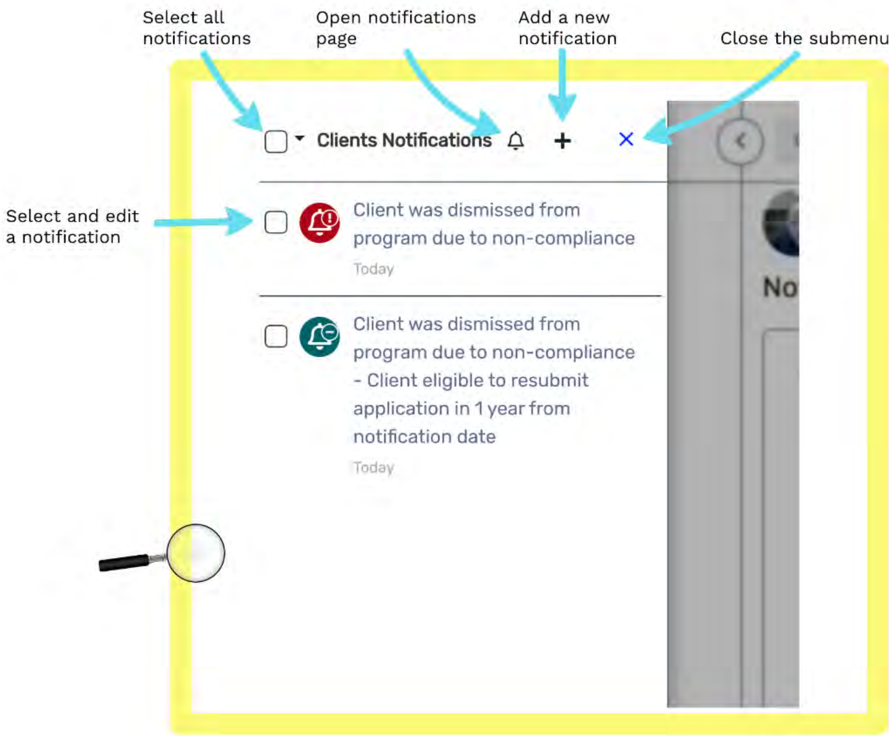
Only show current Notifications: ☑

Status:
- ✓ New/Pending
- ✓ Acknowledged
- Complete
- Canceled

2 results found

Message	Priority	Notification Type	Begin Date	End Date
Client was dismissed from program due to non-compliance	High	No Contact	08/14/2024	
Client was dismissed from program due to non-compliance - Client eligible to resubmit application in 1 year from notification date	Medium	No Contact	08/14/2024	08/14/2025

Figure 4-56 – Client Notification Call-Out Window



Client was dismissed from program due to non-compliance

Today

Client was dismissed from program due to non-compliance - Client eligible to resubmit application in 1 year from notification date

Today

Figure 4-57.z - Client Notification Call-Out Window Anatomy

Viewing Client Notifications through the Edit Client Menu

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".*

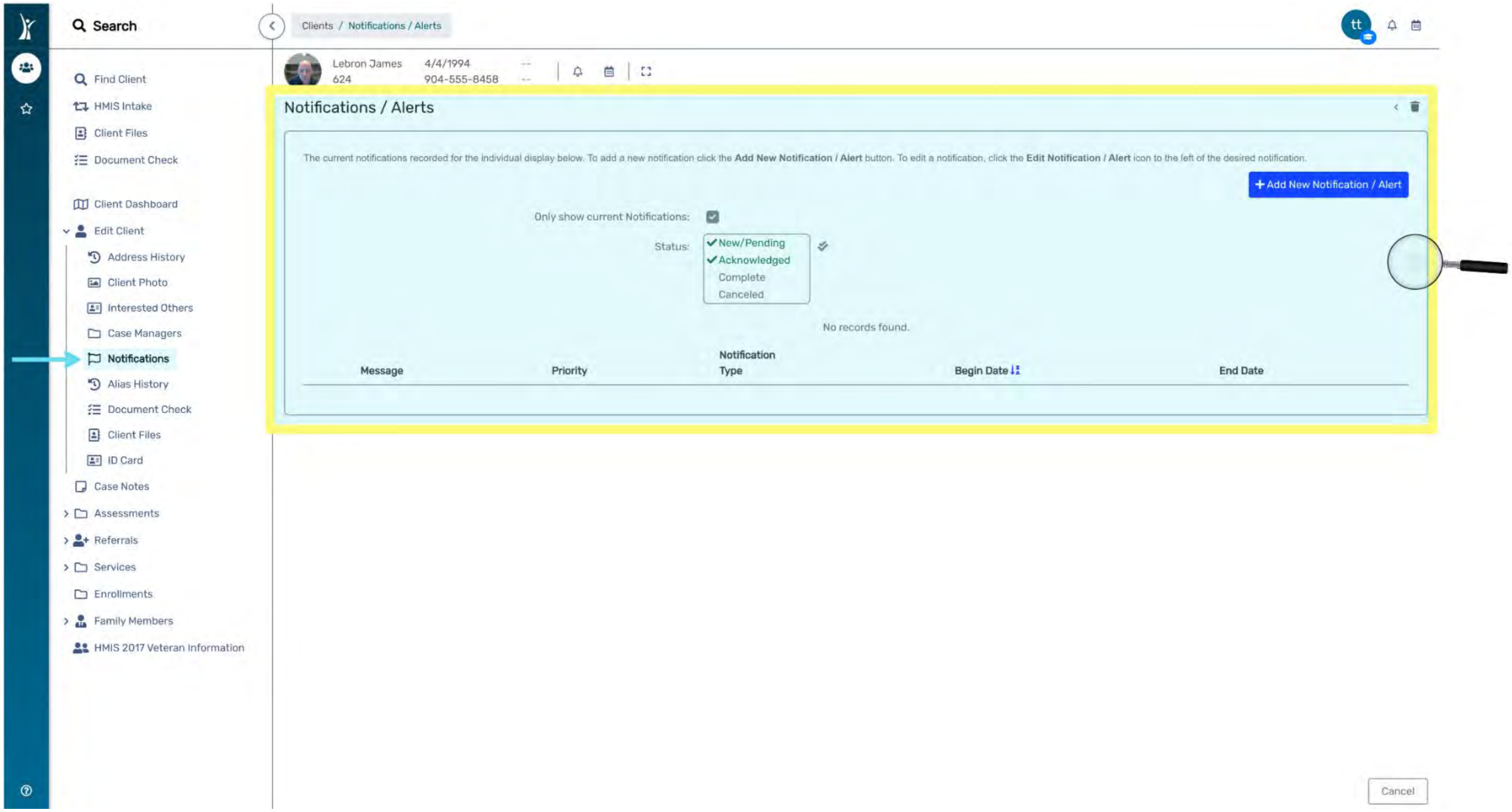
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".*

**** 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 "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" folder.

**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".*

Step 3: Select the "Notifications" subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the "Notification / Alerts" page.



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

Notifications / Alerts

The current notifications recorded for the individual display below. To add a new notification click the **Add New Notification / Alert** button. To edit a notification, click the **Edit Notification / Alert** icon to the left of the desired notification.

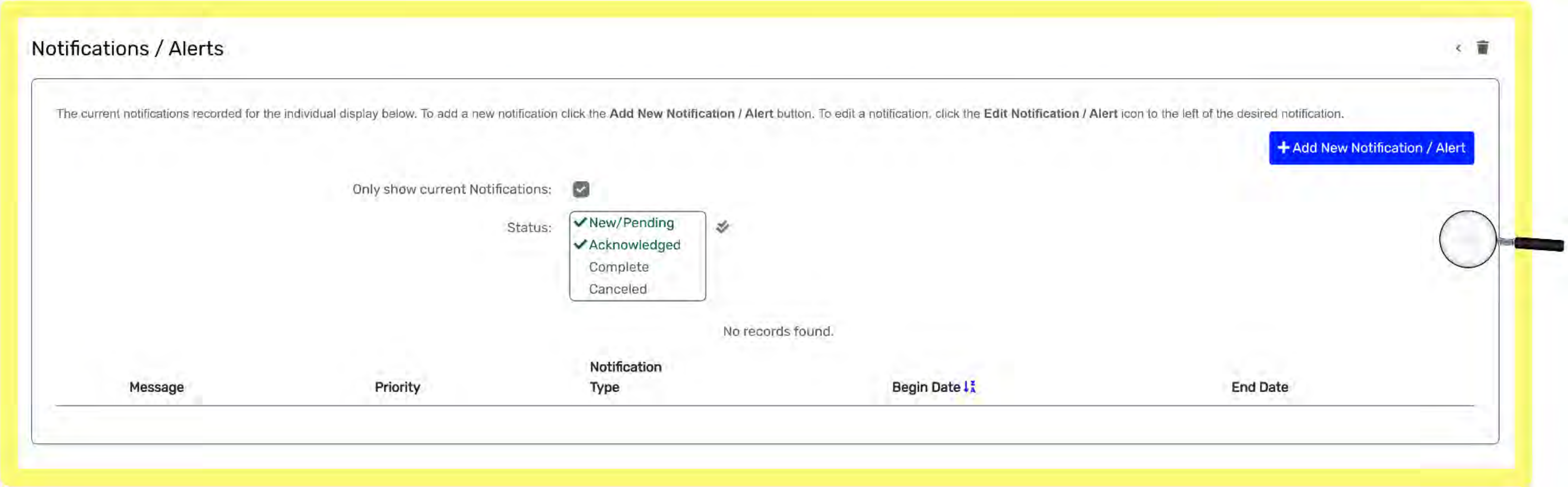
Only show current Notifications: ☑

Status:
✓ New/Pending
✓ Acknowledged
Complete
Canceled

No records found.

Message	Priority	Notification Type	Begin Date	End Date

Figure 4-58 – Viewing Client Notifications



Notifications / Alerts

The current notifications recorded for the individual display below. To add a new notification click the **Add New Notification / Alert** button. To edit a notification, click the **Edit Notification / Alert** icon to the left of the desired notification.

Only show current Notifications: ☑

Status:
- ✓ New/Pending
- ✓ Acknowledged
- Complete
- Canceled

No records found.

Message	Priority	Notification Type	Begin Date	End Date

Figure 4-59.z – Viewing Client Notifications

Step 4: ClientTrack will navigate to the “Notifications/Alerts” form*. Use the filtering options on this page to view any “Notifications/Alerts” within a search criteria**.

**To view all current notifications (notifications that have no end date), check the “Only show current Notifications” box.*

***To filter by “Status”: 1) New/Pending, 2) Acknowledged, 3) Complete or 4) Canceled, click on the status filter you wish to apply. To apply all filters, click the select all icon*.*

**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”.*

After a new filter or search criteria is applied, the workspace container will automatically update, and the filters will apply to the list displayed.

Adding Client Notifications

There are two ways to add existing Notifications in a client's record.

Method #1: Adding Client Notifications through the Notification Bell Icon

Method #2: Adding Client Notifications through the Edit Client Menu

Adding Client Notifications through the Notification Bell Icon

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: Click on the notification bell icon* visible on the client's "Client Workspace" entity bar**.

** 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 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".*

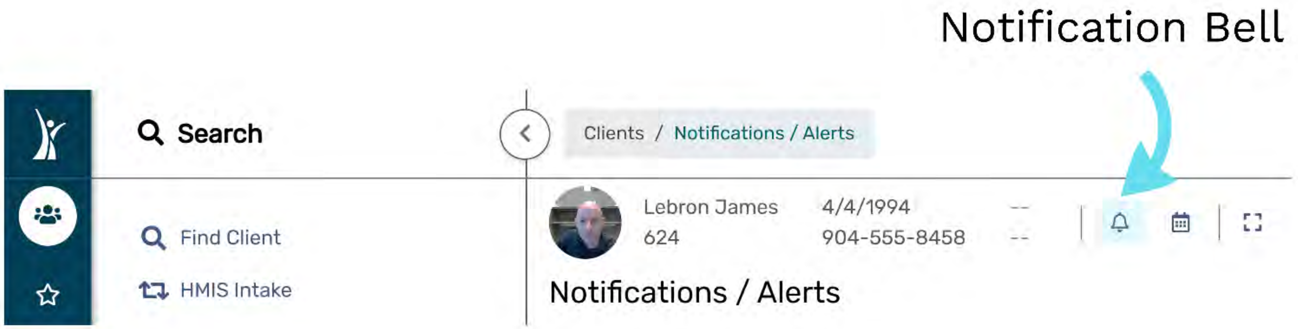
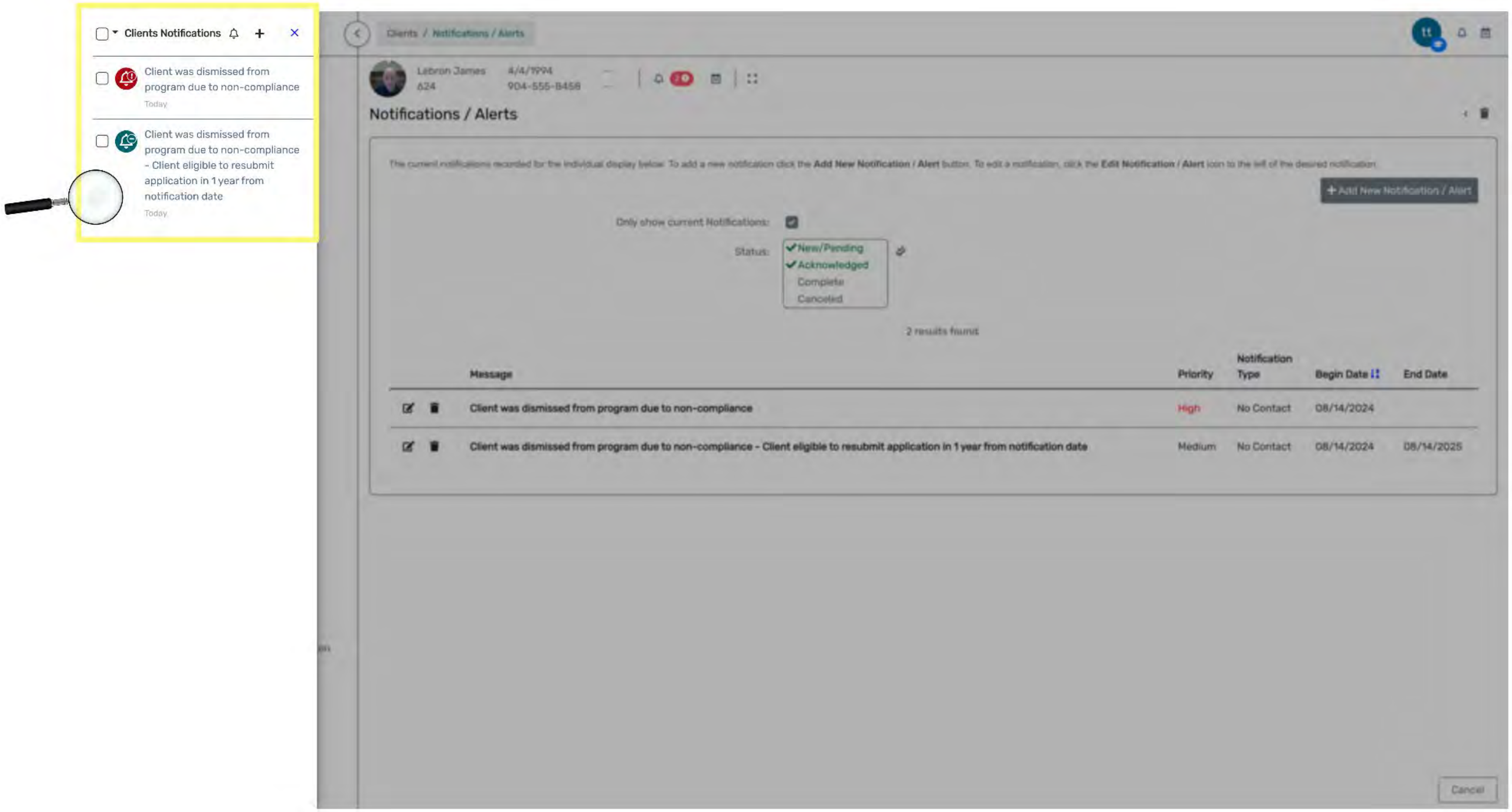


Figure 4-60 – Entity Bar Notification Bell

Step 3: A call-out window will display any notifications created by clicking on the bell icon*. To add a notification, click on the add notification icon in the call-out window. An “Add Notification” pop-up window will appear.

**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”.*



☐ Client was dismissed from program due to non-compliance
Today

☐ Client was dismissed from program due to non-compliance – Client eligible to resubmit application in 1 year from notification date
Today

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

Notifications / Alerts

The current notifications recorded for the individual display below. To add a new notification click the **Add New Notification / Alert** button. To edit a notification, click the **Edit Notification / Alert** icon to the left of the desired notification.

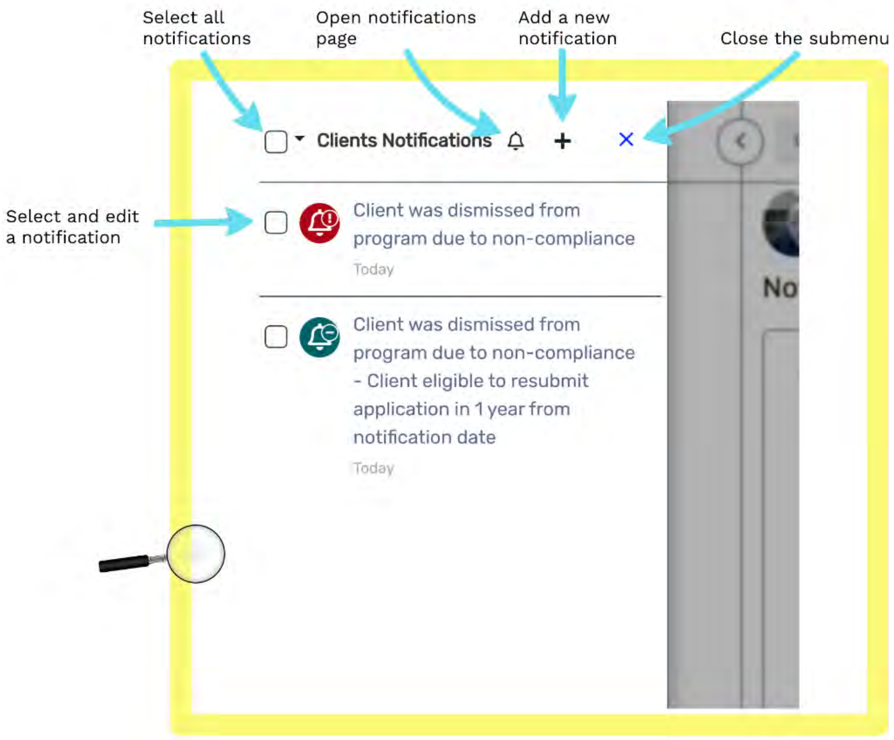
Only show current Notifications: ☑

Status: ✓ New/Pending ✓ Acknowledged Complete Canceled

2 results found

Message	Priority	Notification Type	Begin Date	End Date
Client was dismissed from program due to non-compliance	High	No Contact	08/14/2024	
Client was dismissed from program due to non-compliance - Client eligible to resubmit application in 1 year from notification date	Medium	No Contact	08/14/2024	08/14/2025

Figure 4-61 – Client Notification Call-Out Window



☐ **Clients Notifications**

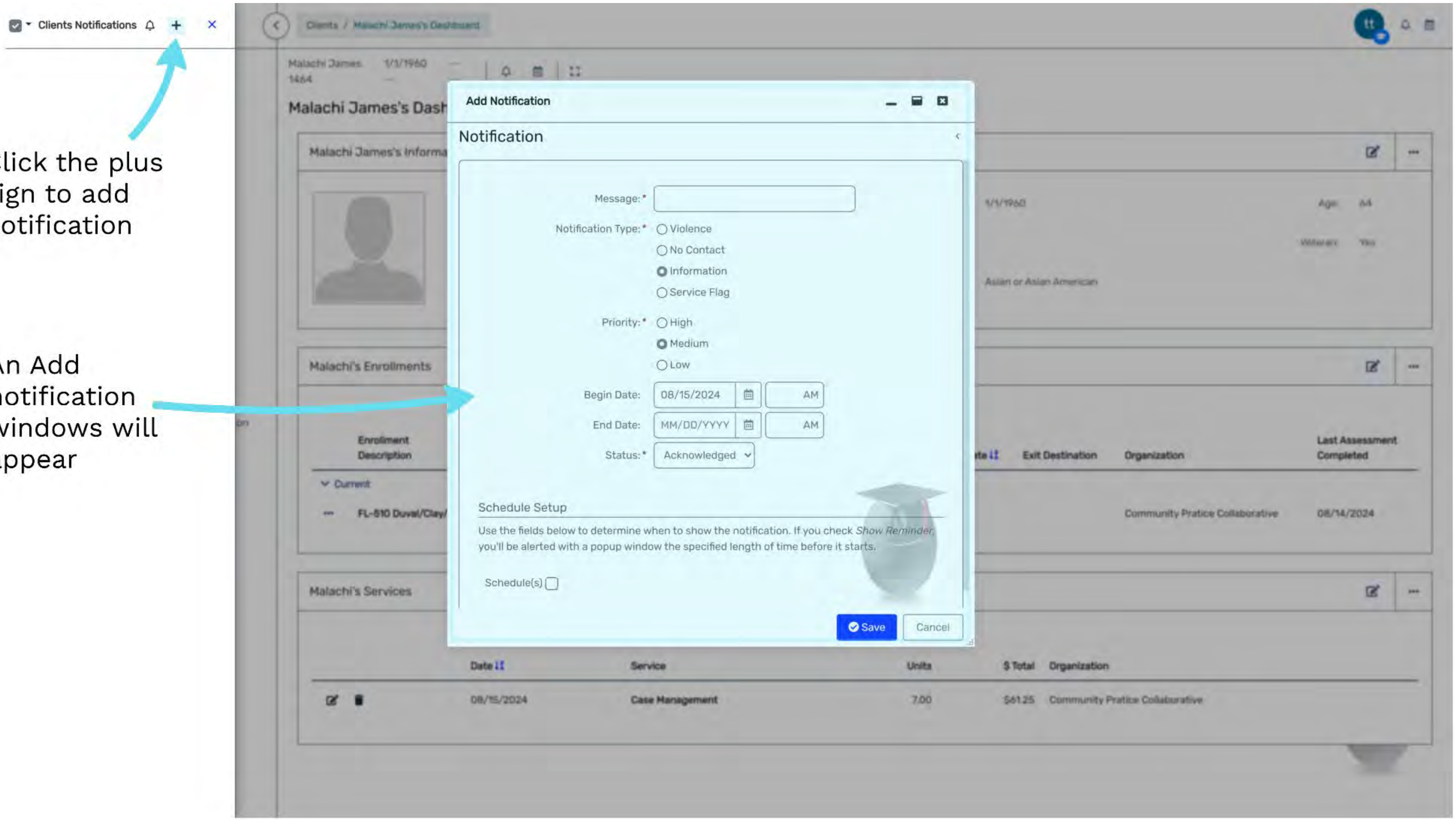
☐ Client was dismissed from program due to non-compliance

Today

☐ Client was dismissed from program due to non-compliance - Client eligible to resubmit application in 1 year from notification date

Today

Figure 4-62.z - Client Notification Call-Out Window Anatomy



Click the plus sign to add notification

An Add notification windows will appear

Notification

Message: *

Notification Type: * ○ Violence ○ No Contact ● Information ○ Service Flag

Priority: * ○ High ● Medium ○ Low

Begin Date: 08/15/2024 AM

End Date: MM/DD/YYYY AM

Status: * Acknowledged

Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder* you'll be alerted with a popup window the specified length of time before it starts.

Schedule(s) ☐

Figure 4-63 – Adding Client Notifications

Step 4: Complete the form as applicable. Required elements are marked with a (*).

Step 5: Click “Save”. ClientTrack will navigate to the “Notifications / Alerts” workspace container. The notification bell in the entity bar will update.

Adding Client Notifications through the Edit Client Menu

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”.*

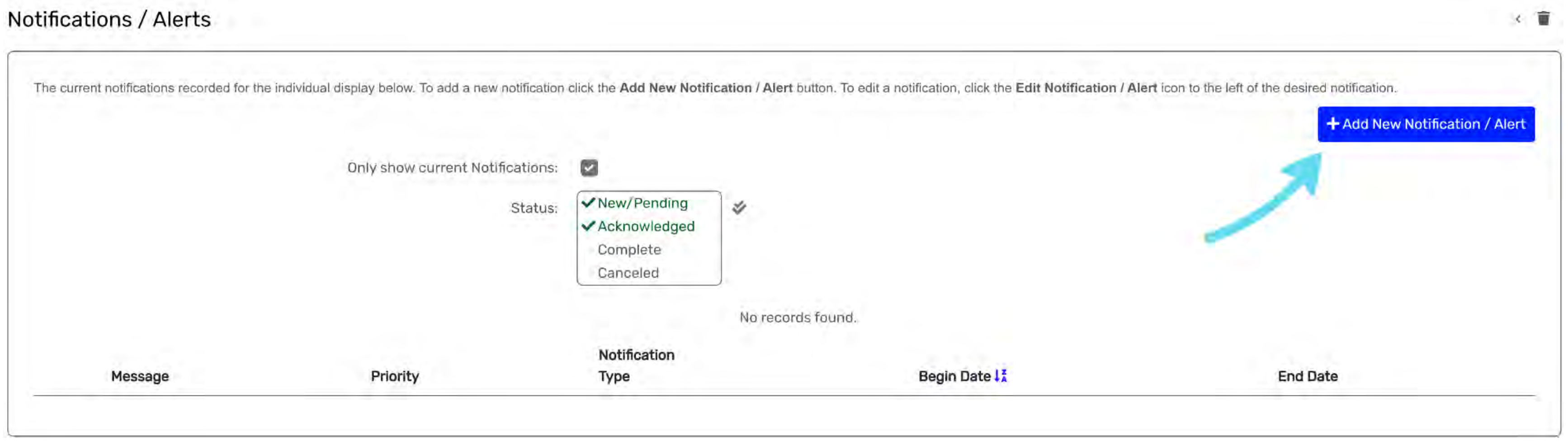
Step 2: Select the “Edit Client” secondary sidebar* menu option. ClientTrack will navigate to the “Client Information” workspace container, and a dropdown menu will appear under the “Edit Client” folder.

** 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”.*

Step 3: Select the “Notifications” subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the “Notification / Alerts” workspace container.

Step 4: Click the “Add New Notification / Alert” button*.

**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".*



The current notifications recorded for the individual display below. To add a new notification click the **Add New Notification / Alert** button. To edit a notification, click the **Edit Notification / Alert** icon to the left of the desired notification.

Only show current Notifications: ☑

Status:
- ✓ New/Pending
- ✓ Acknowledged
- Complete
- Canceled

No records found.

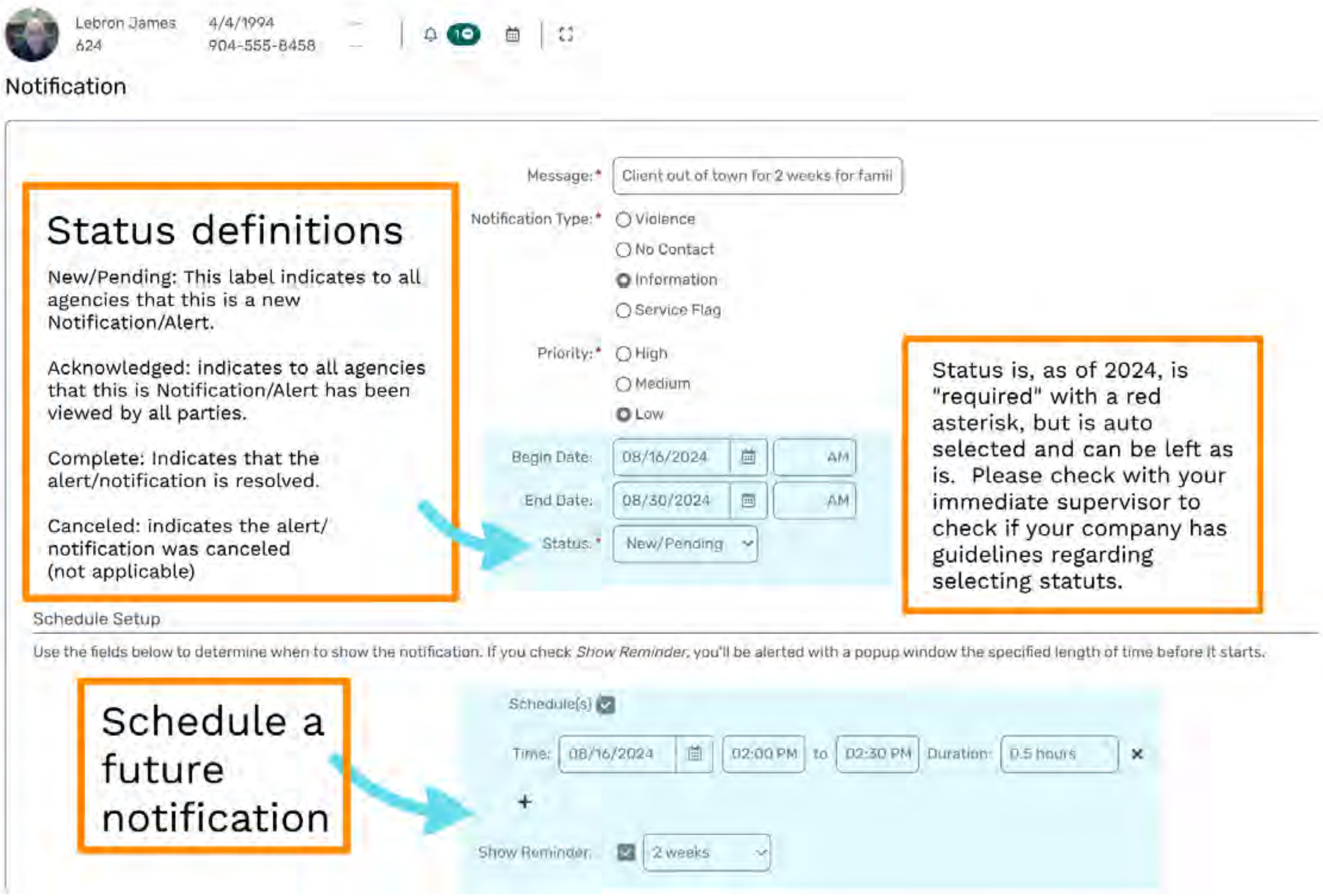
Message	Priority	Notification Type	Begin Date	End Date

Figure 4-64 – Add New Notification through the Edit Client Folder

Step 6: A blank "Notification/Alert" form will appear. Complete the form as applicable. Required elements are marked with a (*).

Step 7: Click "Save". ClientTrack will navigate to the "Notifications / Alerts" workspace container. The notification bell in the entity bar will update.

Optional/Other Client Notification Settings



Lebron James 4/4/1994

624 904-555-8458

Notification

Status definitions

New/Pending: This label indicates to all agencies that this is a new Notification/Alert.

Acknowledged: indicates to all agencies that this is Notification/Alert has been viewed by all parties.

Complete: Indicates that the alert/notification is resolved.

Canceled: indicates the alert/notification was canceled (not applicable)

Message:* Client out of town for 2 weeks for famil

Notification Type:*
○ Violence
○ No Contact
● Information
○ Service Flag

Priority:*
○ High
○ Medium
● Low

Begin Date: 08/16/2024 AM

End Date: 08/30/2024 AM

Status:* New/Pending

Status is, as of 2024, is "required" with a red asterisk, but is auto selected and can be left as is. Please check with your immediate supervisor to check if your company has guidelines regarding selecting statuts.

Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.

Schedule a future notification

Schedule(s) ☑

Time: 08/16/2024 02:00 PM to 02:30 PM Duration: 0.5 hours

Show Reminder: ☑ 2 weeks

Figure 4-65 – Optional/Other Client Notification Settings

Alias History: Subfolder

The "Alias History" is a convenient way to catalog and keep track of any additional client names.

Steps to Navigate to the "Alias History" Subfolder Menu

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".*

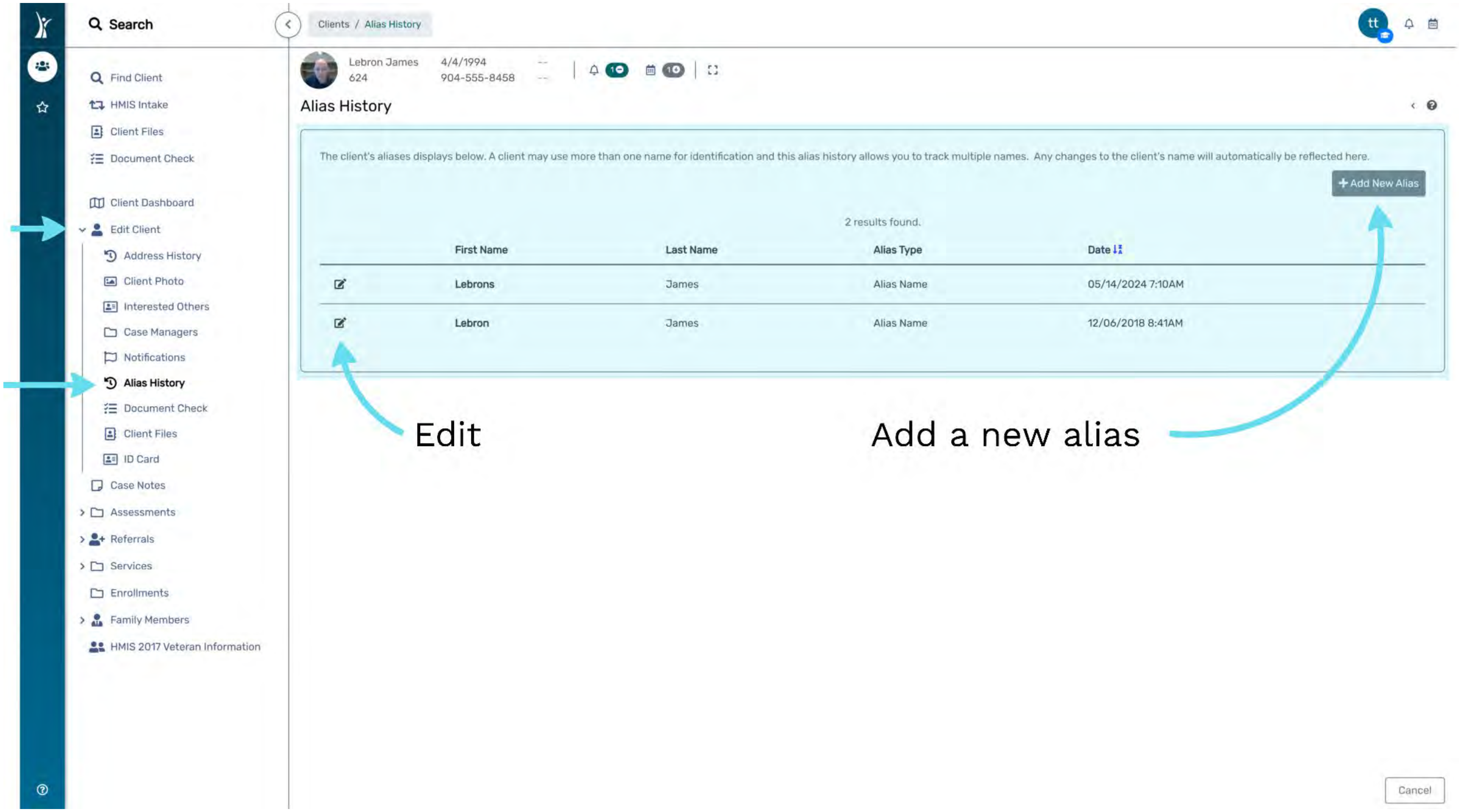
Step 2: Select the "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" folder.

**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".*

Step 3: Select the "Alias History" subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the "Alias History" workspace container.

Steps to Add/Edit an Alias in the "Alias History" Subfolder Menu

Step 1: To view/edit/delete – Click on the edit icon next to the alias you'd like to view/edit/delete. To add a new alias – click the "Add New Alias" button at the top right side of the screen.



The client's aliases displays below. A client may use more than one name for identification and this alias history allows you to track multiple names. Any changes to the client's name will automatically be reflected here.

2 results found.

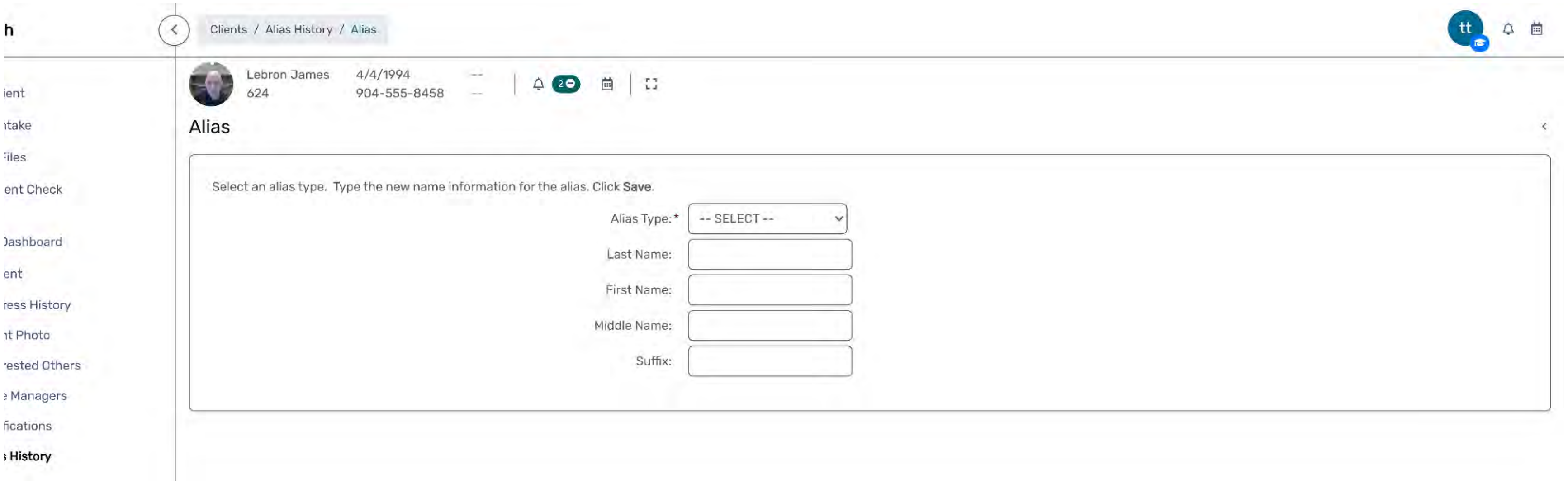
	First Name	Last Name	Alias Type	Date
	Lebrons	James	Alias Name	05/14/2024 7:10AM
	Lebron	James	Alias Name	12/06/2018 8:41AM

Edit

Add a new alias

Figure 4-66 – Editing and/or Adding New Alias

Step 2: Complete the form as applicable. Required elements are marked with a (*).



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

Alias

Select an alias type. Type the new name information for the alias. Click **Save**.

Alias Type:* -- SELECT --
Last Name:
First Name:
Middle Name:
Suffix:

Figure 4-67 - Editing and/or Adding New Alias Form

Step 3: Click “Save” to save any changes. Click “Cancel” to not save changes. ClientTrack will navigate back to the “Alias History” page.

Document Check: Subfolder

The “Document Check” subfolder can also be accessed through the “Document Check” folder* option in the Client Workspace’s secondary sidebar* menu.

**For instructions on the “Document Check” folder, view Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Document Check: Folder in the “HMIS Basic User 2025 Manual” for more detailed information.*

***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”.*

Client Files: Subfolder

The “Client Files” subfolder can also be accessed through the “Client Files” folder* option in the Client Workspace’s secondary sidebar** menu.

**For instructions on the “Client Files” folder, view Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Client Files: Folder 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”.*

ID Card: Subfolder

For information on Client ID Cards, please email the HMIS Administration team at hmis@changinghomelessness.org .

Print Out Temporary Client ID

Temporary Client ID cards that will be recognized by the scanners used in shelters are available to print.

Steps to Navigate to the "ID Card" Subfolder Menu

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".*

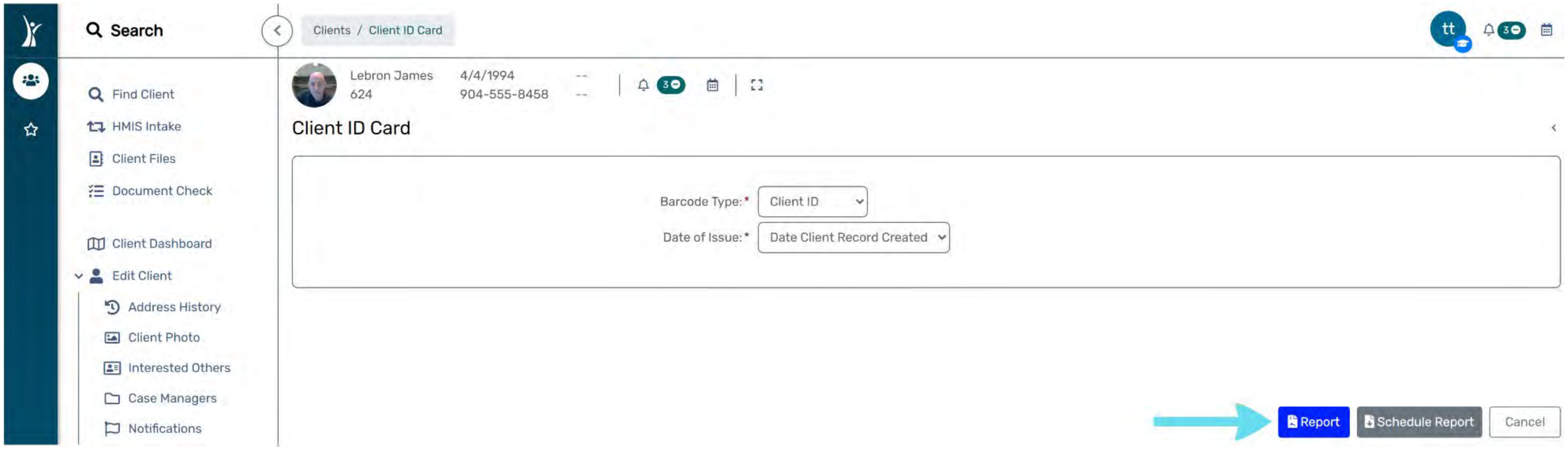
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

Step 2: Select the "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" 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".*

Step 3: Select the "ID Card" secondary sidebar menu option from the "Edit Client" dropdown menu. ClientTrack will navigate to the "Client ID Card" page.

Step 4: Click "Report" without changing any default settings.



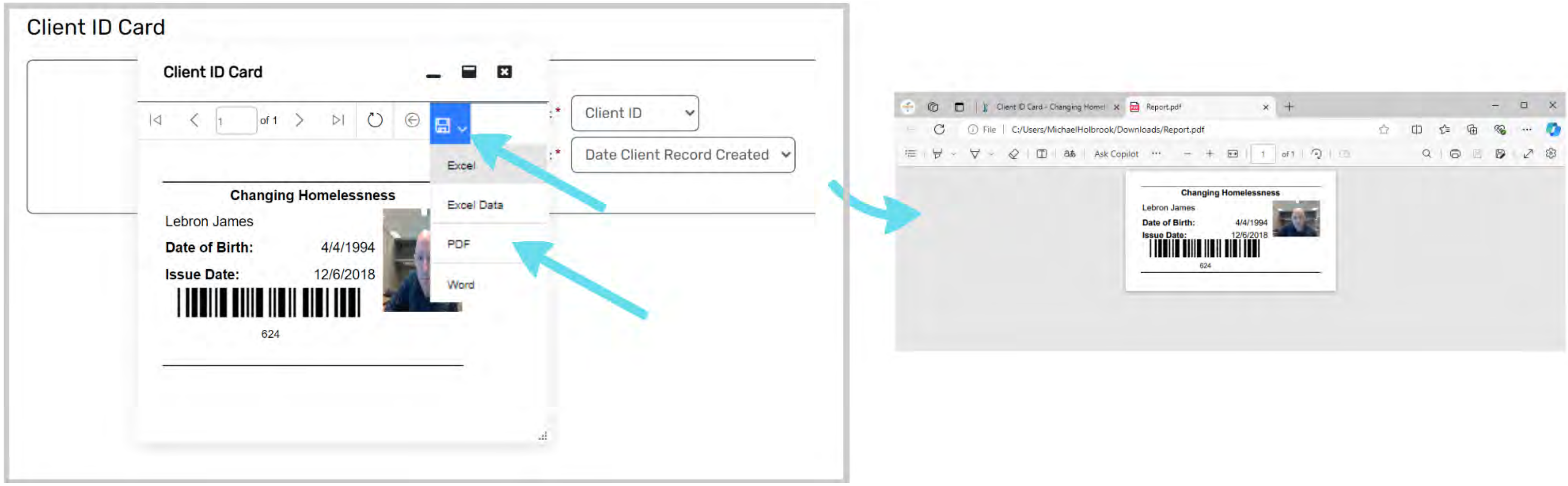
Barcode Type:* Client ID

Date of Issue:* Date Client Record Created

Figure 4-68 – Client ID Card - Report

Step 5: A pop-up window that generates the temporary Client ID card will appear. Click the save icon and choose your export format.

Step 6: Print the Client ID out from exported destination program.



Changing Homelessness
Lebron James
Date of Birth: 4/4/1994
Issue Date: 12/6/2018
624

Figure 4-69 – Client ID Card - Print

Case Notes: Folder

The “Case Notes” folder is where case notes are added to a client’s record. Please keep in mind that multiple agencies may be adding case notes to any client’s record, so labeling them with a clear and concise title helps in identifying correct case notes.

Case notes are accessible to all agencies. The information entered in a case note must fall within HIPAA guidelines. In general, each time a service* is added to the Client’s Record, there should be a case note to accompany it.

**For instructions on the “Services” folder, view Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Services: Folder in the “HMIS Basic User 2025 Manual” for more detailed information.*

Steps to Navigate to the “Case Notes” Folder Menu

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".***

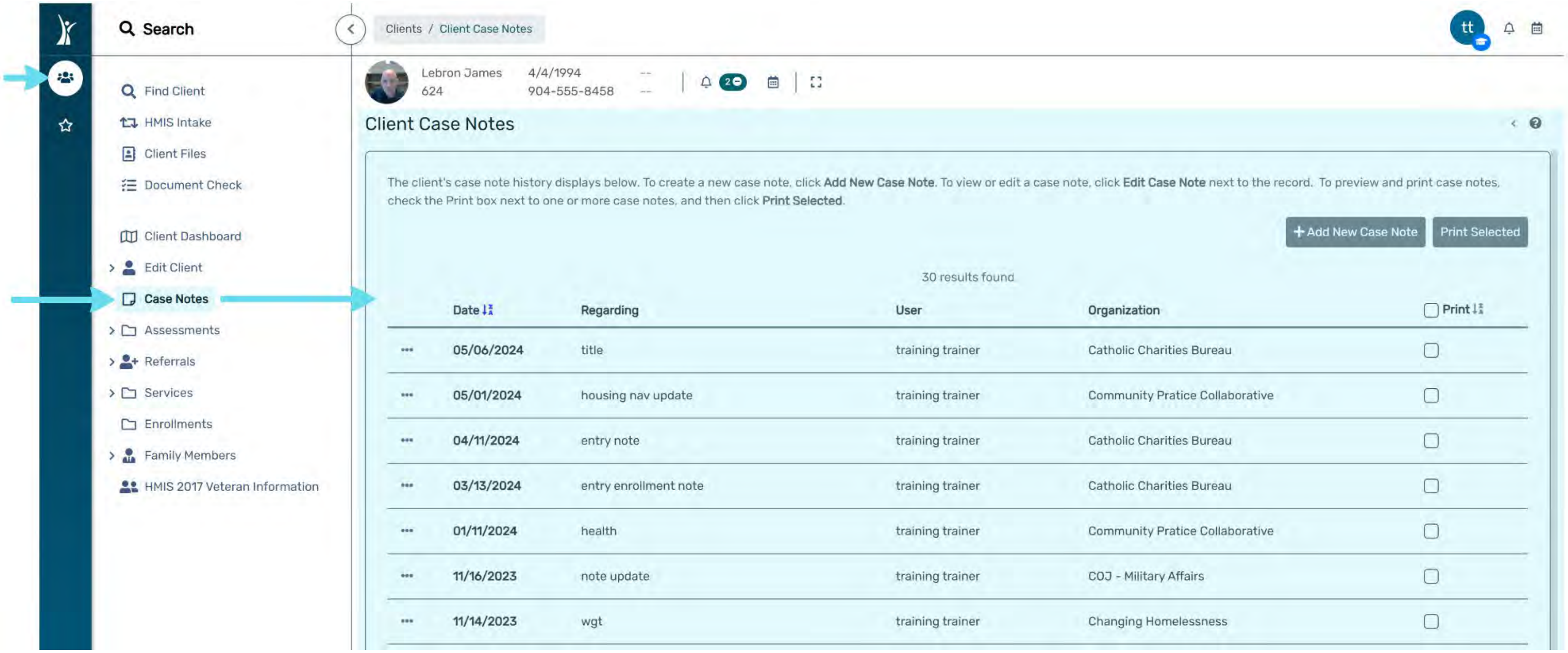
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".*

*** 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 "Case Notes" secondary sidebar* menu option. ClientTrack will navigate to the "Client Case Notes" 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".*



Client Case Notes

The client's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the Print box next to one or more case notes, and then click **Print Selected**.

30 results found

	Date	Regarding	User	Organization	☐ Print
•••	05/06/2024	title	training trainer	Catholic Charities Bureau	☐
•••	05/01/2024	housing nav update	training trainer	Community Pratice Collaborative	☐
•••	04/11/2024	entry note	training trainer	Catholic Charities Bureau	☐
•••	03/13/2024	entry enrollment note	training trainer	Catholic Charities Bureau	☐
•••	01/11/2024	health	training trainer	Community Pratice Collaborative	☐
•••	11/16/2023	note update	training trainer	COJ - Military Affairs	☐
•••	11/14/2023	wgt	training trainer	Changing Homelessness	☐

Figure 4-70 – Case Notes Folder

Viewing Existing Case Notes

Steps to View Existing Case Notes

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 "Case Notes" secondary sidebar* menu option. ClientTrack will navigate to the "Client Case Notes" 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".*

Step 3: View the contents of a case note by clicking the search icon* next to the appropriate case note.

**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".*

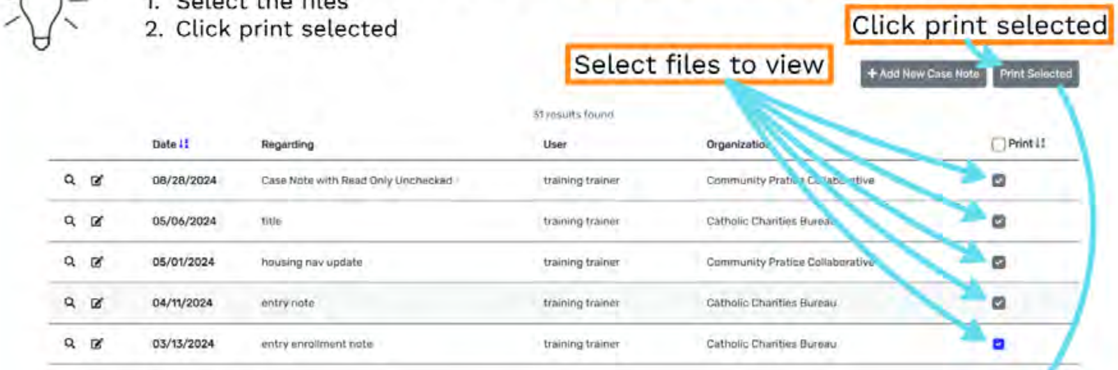
"View Case Note" and "Edit Case Note"

	Date	Regarding	User	Organization	☐ Print
🔍 ✎	08/28/2024	Case Note with Read Only Unchecked	training trainer	Community Pratice Collaborative	☐
🔍 ✎	05/06/2024	title	training trainer	Catholic Charities Bureau	☐

Figure 4-71 -View/Edit Case Note

Tips and Tricks - *View Multiple Case Notes at Once through Print Selected*

- In a scenario where multiple case notes are to be viewed as efficiently as possible:
  1. Select the files
  2. Click print selected


Click print selected

Select files to view

		Date ↓↑	Regarding	User	Organization	☐ Print ↓↑
🔍	✎	08/28/2024	Case Note with Read Only Unchecked	training trainer	Community Pratice Collaborative	☑
🔍	✎	05/06/2024	title	training trainer	Catholic Charities Bureau	☑
🔍	✎	05/01/2024	housing nav update	training trainer	Community Pratice Collaborative	☑
🔍	✎	04/11/2024	entry note	training trainer	Catholic Charities Bureau	☑
🔍	✎	03/13/2024	entry enrollment note	training trainer	Catholic Charities Bureau	☑

- A print preview of all selected case notes will be displayed.

training trainer
8/28/2024
Case Note with Read Only Unchecked

Case Note

Client Name: Lebron James

training trainer
5/6/2024
title

Case Note

Client Name: Lebron James

training trainer
5/1/2024
housing nav update

Case Note

Client Name: Lebron James

Mr Lebron had housing located on 5/1/2024 at 123 acme blvd

Figure 4-72 – Tips and Tricks – View Multiple Case Notes at Once Through Print Selected

Adding New Case Notes

Steps to Adding New Case Notes

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 "Case Notes" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" 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".*

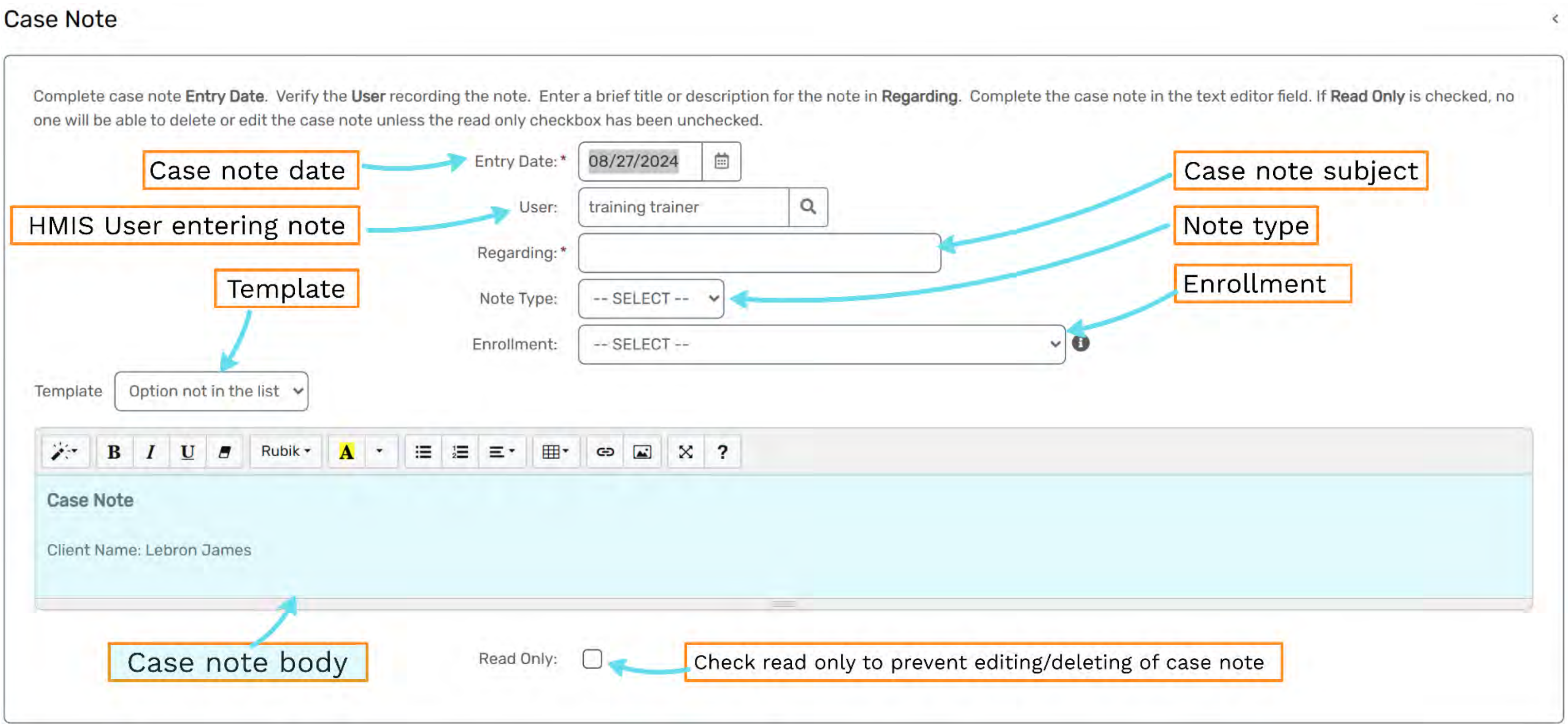
Step 3: Select the "Add New Case Note" button. A blank "Case Note" form will populate.

Step 4: Verify the "Entry Date" field. It will default with today's date. To change this date, click in the "Entry Date" field, delete the contents, and add the Entry Date in MM/DD/YYYY format, or click on the calendar icon and select the correct date.

Step 5: The “User” field will default to the logged in user and should not be changed. In the “Regarding” field, type a clear and concise descriptor/summary of your note for easy retrieval in the future. Optionally, you can select a category for “Note Type” and “Enrollment” from the drop down.

Step 6: Type a case note in the Case Note body.

Step 7: Check the “Read Only” box. This will ensure the case note cannot be edited/deleted by another user.



Case Note

Complete case note **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text editor field. If **Read Only** is checked, no one will be able to delete or edit the case note unless the read only checkbox has been unchecked.

Entry Date:* 08/27/2024

User: training trainer

Regarding:*

Note Type: -- SELECT --

Enrollment: -- SELECT --

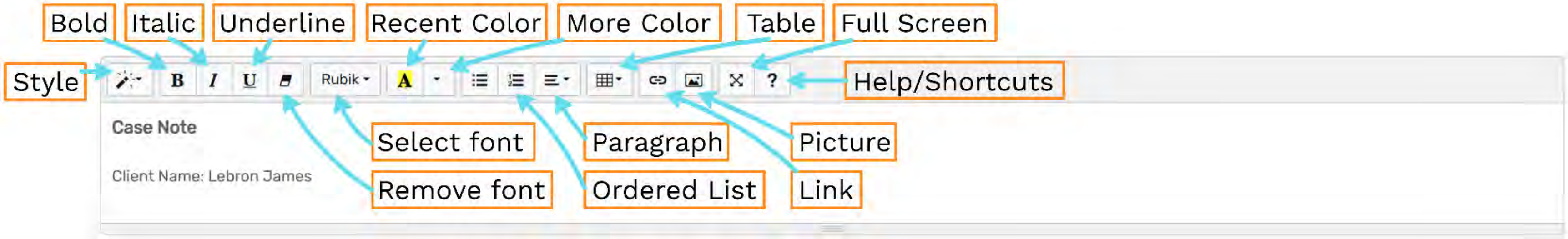
Template: Option not in the list

Case Note

Client Name: Lebron James

Read Only: ☐

Figure 4-73 – Case Note Form Anatomy



Case Note

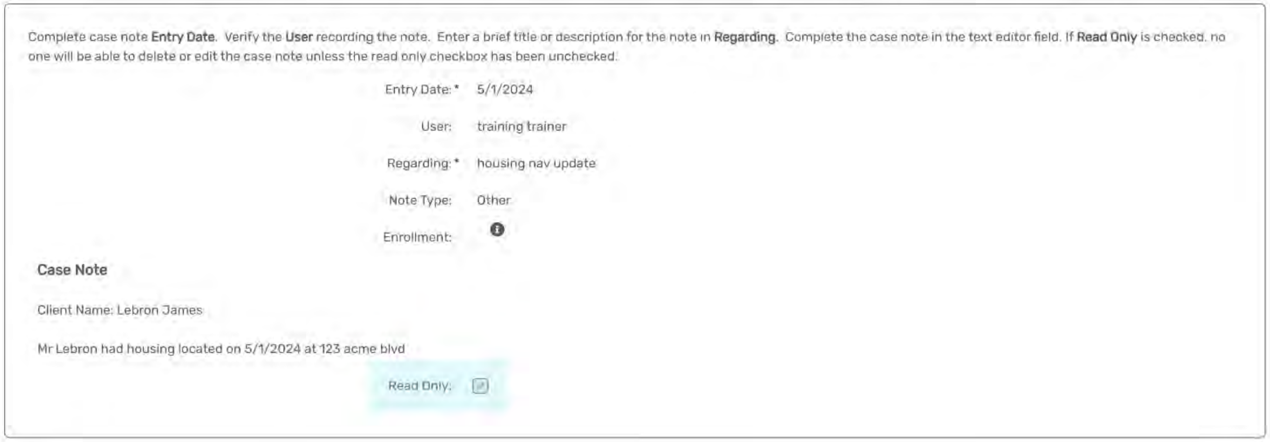
Client Name: Lebron James

Figure 4-74 – Case Note Body Menu Options

Step 8: Click “Save”. ClientTrack will navigate to the “Client Case Notes” workspace container. The case note will be viewable.

Tips and Tricks - *Checking "Read Only" on Case Notes*

- Before saving case notes, if the "Read Only" box at the bottom of the case note container screen is not checked, other HMIS users can edit the case note. It is best practice to always check "Read Only" on case notes.



Complete case note **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text editor field. If **Read Only** is checked, no one will be able to delete or edit the case note unless the read only checkbox has been unchecked.

Entry Date: * 5/1/2024

User: training trainer

Regarding: * housing nav update

Note Type: Other

Enrollment:

Case Note

Client Name: Lebron James

Mr Lebron had housing located on 5/1/2024 at 123 acme blvd

Read Only: ☑

"View Case Note" and "Edit Case Note"

	Date	Regarding	User	Organization	☐ Print
🔍 ✎	08/28/2024	Case Note with Read Only Unchecked	training trainer	Community Pratice Collaborative	☐
🔍 ✎	05/06/2024	title	training trainer	Catholic Charities Bureau	☐

- "Edit Case Note" is an option, however, when "Read Only" has been checked, the case note is not editable and only viewable.

- If a case note needs to be deleted, the "Read Only" box needs to be unselected. Next, a ticket must be submitted or an email sent to hmis@changinghomelessness.org requesting the deletion.

Figure 4-75 – Tips and Tricks – Checking "Read Only" on Case Notes

Editing Case Notes

For best practices, case notes shouldn't be edited. However, where a mistake was made and needs to be corrected, editing case notes is an option.

Steps to Editing Existing Case Notes

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 "Case Notes" secondary sidebar* menu option. ClientTrack will navigate to the "Client Case Notes" 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".*

Step 3: On the list displayed, click on the "edit" icon next to the case note to be edited. Select "Edit Case Note".

"View Case Note" and "Edit Case Note"

	Date	Regarding	User	Organization	☐ Print
🔍 ✎	08/28/2024	Case Note with Read Only Unchecked	training trainer	Community Pratice Collaborative	☐
🔍 ✎	05/06/2024	title	training trainer	Catholic Charities Bureau	☐

Figure 4-76 - View/Edit Case Note

Step 4: Uncheck the "Read Only" box

Step 5: The page will reload and become editable. Update fields as applicable*, recheck the "Read Only" box.

**For instructions on how to add a new case note, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Case Notes: Folder/Adding New Case Notes in the "HMIS Basic User 2025 Manual".*

Step 6: Click "Save" or "Cancel". To save changes, click "Save." If no changes were made, or to cancel any changes made, click "Cancel". "Save" or "Cancel" is selected, ClientTrack will navigate to the "Client Case Notes" page.

Deleting Case Notes

Steps to Deleting Case Notes

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 "Case Notes" secondary sidebar* menu option. ClientTrack will navigate to the "Client Case Notes" 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".*

Step 3: On the list displayed, click on the "edit" icon next to the case note to be edited. Select "Edit Case Note".

"View Case Note" and "Edit Case Note"

		Date	Regarding	User	Organization	☐ Print
🔍	✎	08/28/2024	Case Note with Read Only Unchecked	training trainer	Community Pratice Collaborative	☐
🔍	✎	05/06/2024	title	training trainer	Catholic Charities Bureau	☐

Figure 4-77 - View/Edit Case Note

Step 4: Uncheck the "Read Only" box

Step 5: Send a detailed email, including the client # and case note date, to hmis@changinghomelessness.org.

Printing Case Notes

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".*

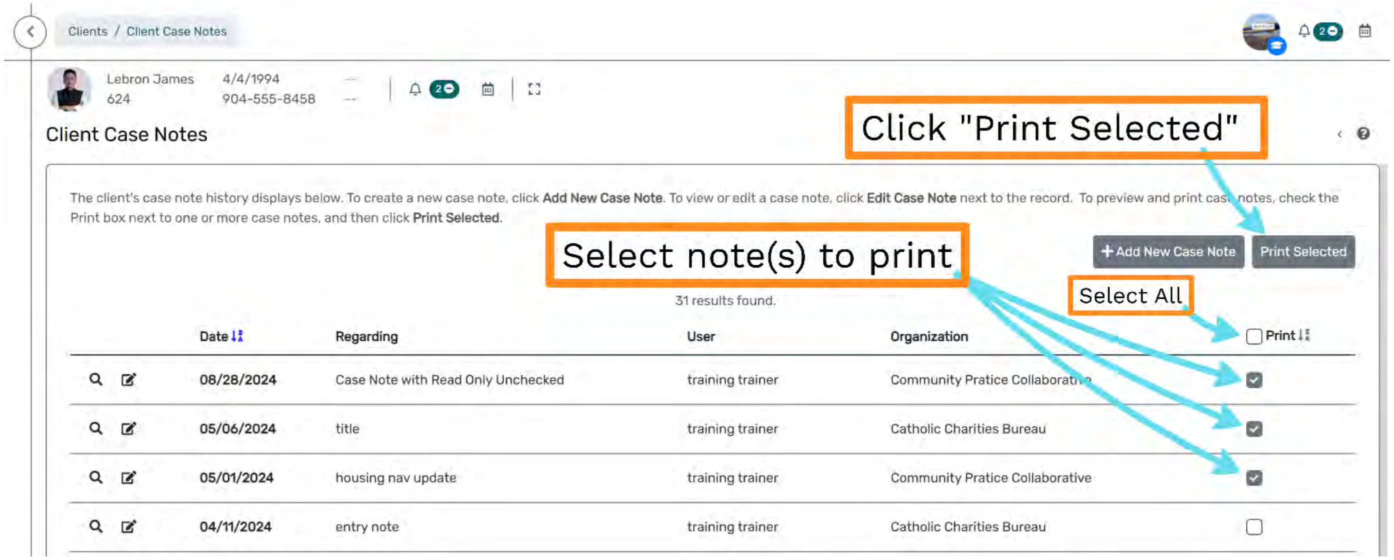
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".*

**** 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 "Case Notes" secondary sidebar* menu option. ClientTrack will navigate to the "Client Case Notes" 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".*

Step 3: To print a case note, click the "Select" icon in the print column next to the appropriate file(s) and click "Print Selected". A pop-up window will appear.



Client Case Notes

Click "Print Selected"

The client's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the Print box next to one or more case notes, and then click **Print Selected**.

Select note(s) to print

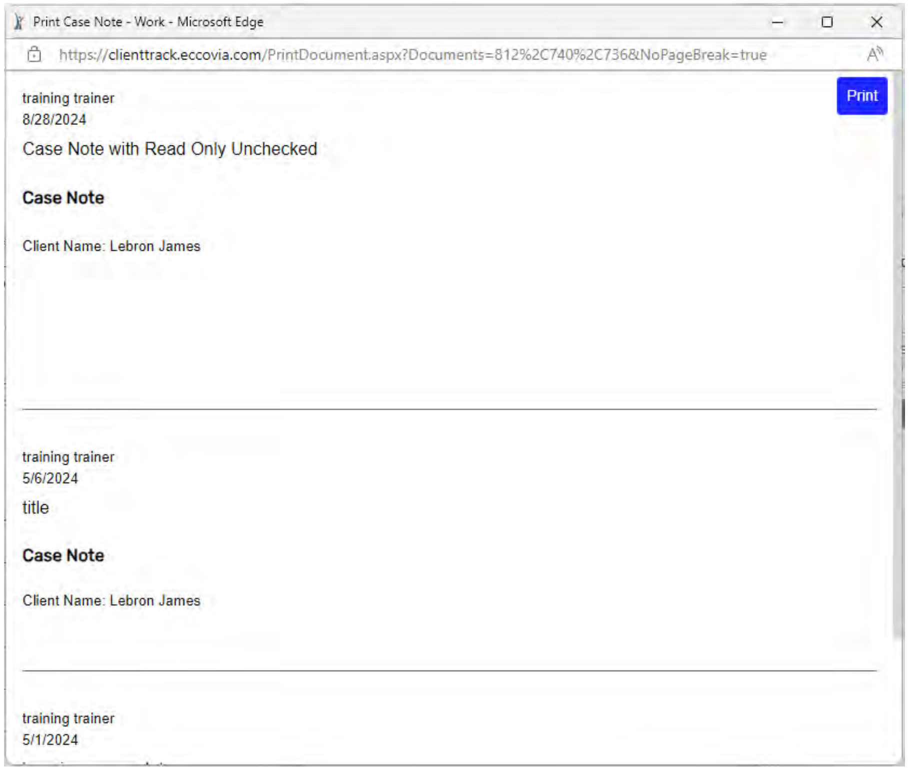
Select All

31 results found.

	Date	Regarding	User	Organization	☐ Print
	08/28/2024	Case Note with Read Only Unchecked	training trainer	Community Pratice Collaborative	☑
	05/06/2024	title	training trainer	Catholic Charities Bureau	☑
	05/01/2024	housing nav update	training trainer	Community Pratice Collaborative	☑
	04/11/2024	entry note	training trainer	Catholic Charities Bureau	☐

Figure 4-78 – Select Case Notes to Print

Step 4: Click the “Print” button. Use your local print procedures to print.



training trainer
8/28/2024

Case Note with Read Only Unchecked

Case Note

Client Name: Lebron James

---

training trainer
5/6/2024

title

Case Note

Client Name: Lebron James

---

training trainer
5/1/2024

Figure 4-79 – Print Case Notes

Assessments: Folder

Assessments* in ClientTrack is a data collection tool designed to accommodate data collection needs by both HUD (Universal Data Elements) and specific program requirements (Program Specific Data Elements).

** For more information on how data is captured and managed in assessments, see Chapter 5: Basics of Entering Data into ClientTrack/Assessments*

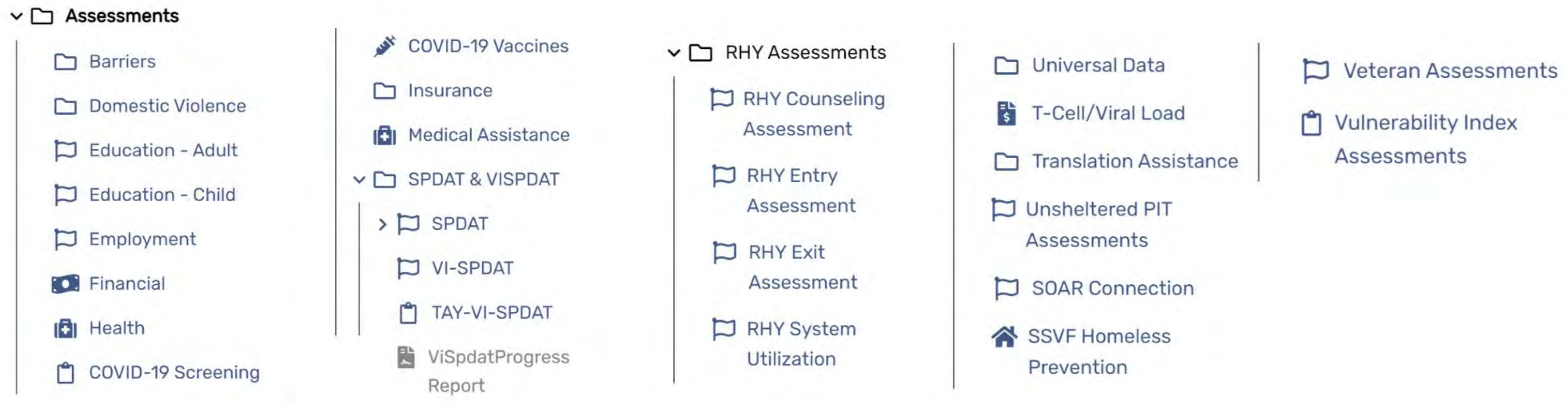


Figure 4-80 – Assessments

Master Assessments

A “Master Assessment”* form creates an “Assessment ID” which ties Universal Data Element Assessments (Universal Data Assessments) with Program Specific Data Element Assessments (Program Specific Assessments).

** For more information on how data is captured and managed in assessments, see Chapter 5: Basics of Entering Data into ClientTrack/Assessments*

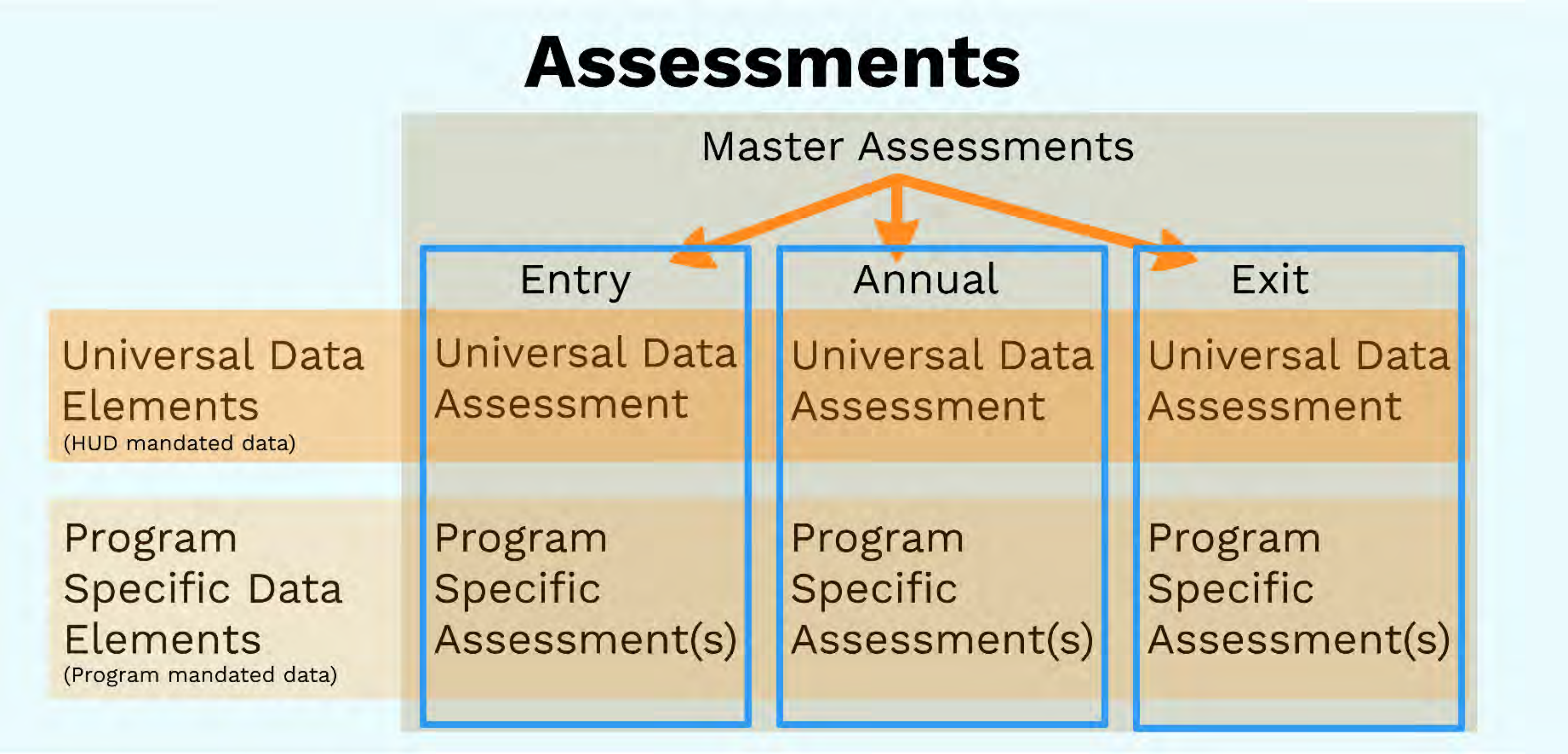


Figure 4-81– Assessments in ClientTrack

Steps to Navigating to Client Assessments Folder

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***.

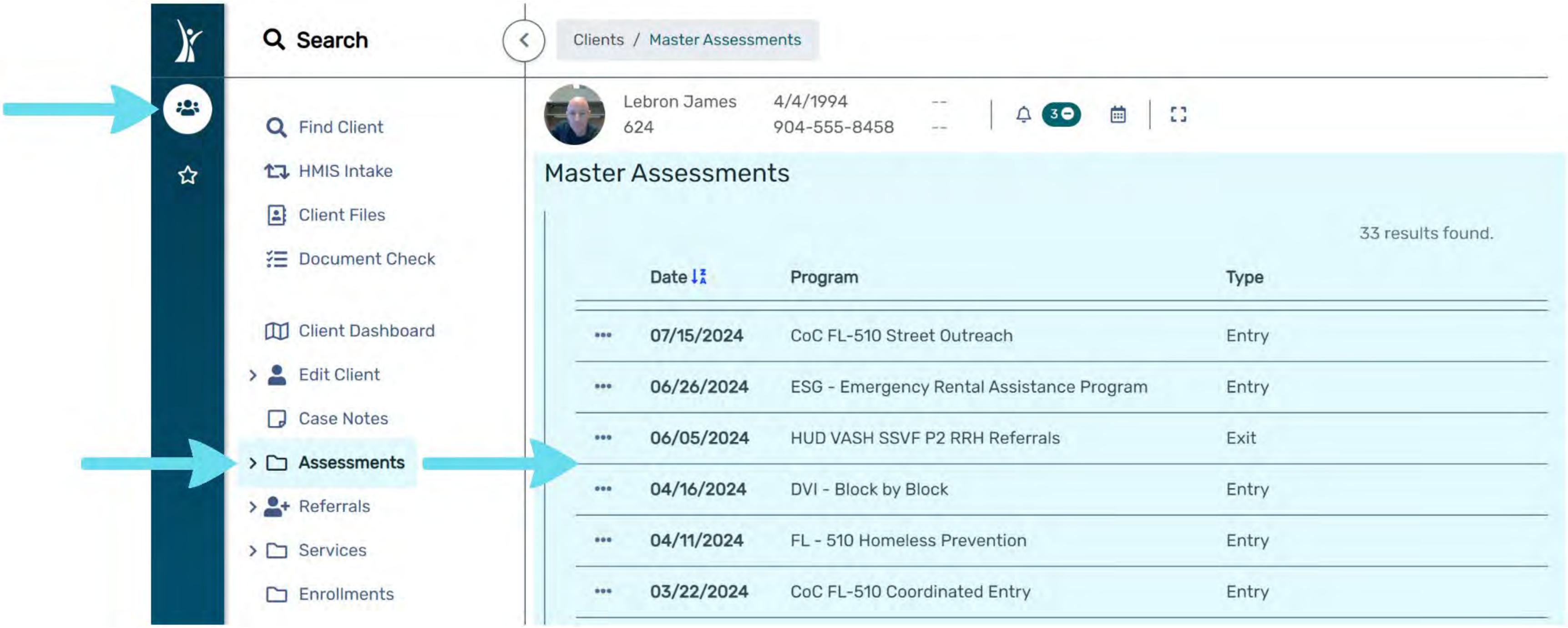
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".*

*** 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 "Assessments" secondary sidebar* menu option. ClientTrack will navigate to the "Master Assessments" workspace container, and a dropdown menu will appear under the "Assessments" folder.

**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".*



Master Assessments

33 results found.

	Date	Program	Type
•••	07/15/2024	CoC FL-510 Street Outreach	Entry
•••	06/26/2024	ESG - Emergency Rental Assistance Program	Entry
•••	06/05/2024	HUD VASH SSVF P2 RRH Referrals	Exit
•••	04/16/2024	DVI - Block by Block	Entry
•••	04/11/2024	FL - 510 Homeless Prevention	Entry
•••	03/22/2024	CoC FL-510 Coordinated Entry	Entry

Figure 4-82 – Client Assessments Folder

Viewing Client Master Assessments

Viewing Client Assessments

There are two ways to view assessments.

Method 1 of 2 - Through the "Assessments" folder (Master Assessments workspace container)

** For information and instructions on how to view a client's master assessment through a particular enrollment, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Master Assessments/Viewing List of all Client's Master Assessments for all Client Program Enrollments*

Method 2 of 2 - Through the “Enrollments” folder.

** For information and instructions on how to view a client’s master assessment through a particular enrollment, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Master Assessments/Viewing Master Assessments for Particular Enrollments*

Viewing List of all Client’s Master Assessments for all Client Program Enrollments

Steps to View all Master Assessments via the Assessments Folder

This is method 1* of 2 to viewing Master Assessments**.

** For information and instructions on how to view a client’s master assessment through a particular enrollment, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Master Assessments/Viewing Master Assessments for Particular Enrollments*

***For information on Editing Assessments, see Chapter 5: Basics of Entering Data into ClientTrack/Editing an Existing Enrollment: Editing Assessments*

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”.***

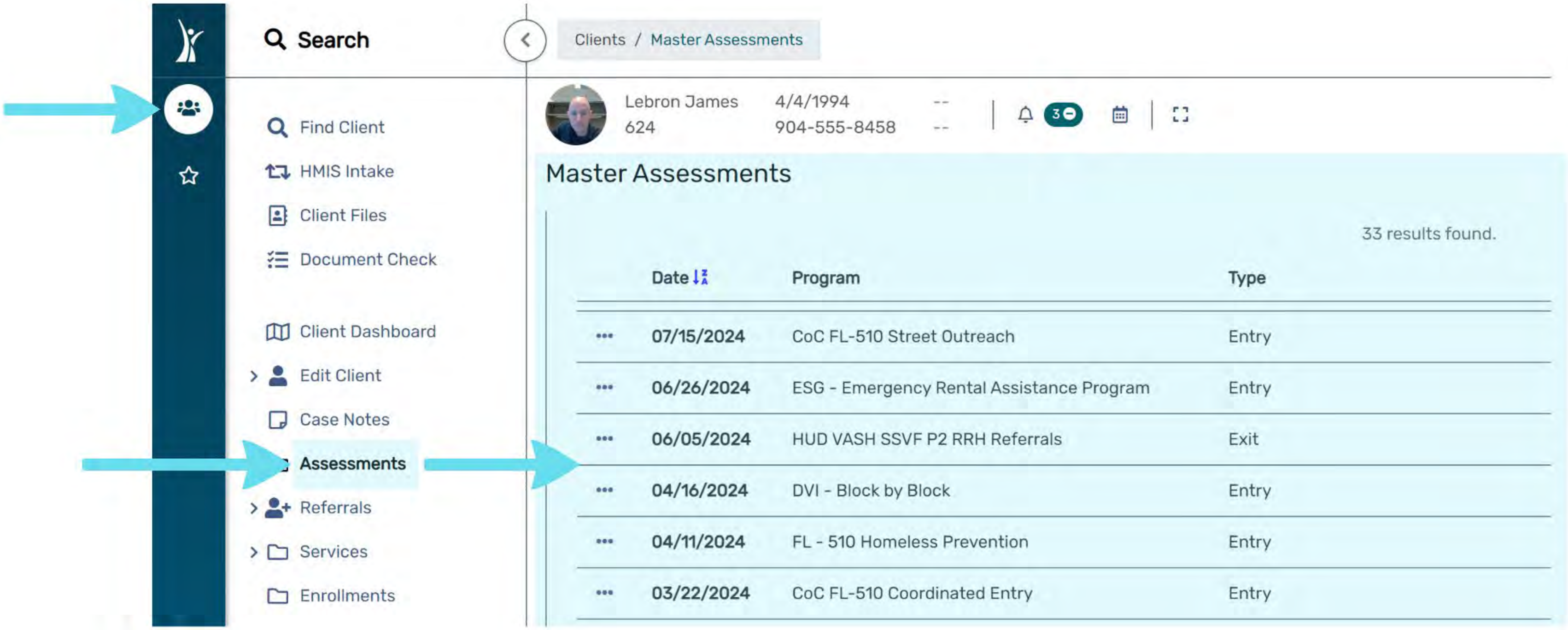
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*** 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 “Assessments” secondary sidebar menu option. ClientTrack will navigate to the “Master Assessments” workspace container*, and a dropdown menu will appear under the “Assessments” folder. This will display a list of all “Master Assessment” workflows (Entry, Annual, During Program Enrollment, Exit).

** 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”.*



Master Assessments

33 results found.

	Date	Program	Type
•••	07/15/2024	CoC FL-510 Street Outreach	Entry
•••	06/26/2024	ESG - Emergency Rental Assistance Program	Entry
•••	06/05/2024	HUD VASH SSVF P2 RRH Referrals	Exit
•••	04/16/2024	DVI - Block by Block	Entry
•••	04/11/2024	FL - 510 Homeless Prevention	Entry
•••	03/22/2024	CoC FL-510 Coordinated Entry	Entry

Figure 4-83 - – Client Assessments Folder

Viewing Master Assessments for Particular Enrollments

Steps to View Master Assessments for Particular Enrollments (Entry and Exit*)

This is method 2* of 2 to viewing Master Assessments.**

** For information and instructions on how to view a client's master assessment through a particular enrollment, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Master Assessments/Viewing List of all Client's Master Assessments for all Client Program Enrollments*

***For information on Editing Assessments, see Chapter 5: Basics of Entering Data into ClientTrack/Editing an Existing Enrollment: Editing Assessments*

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".*

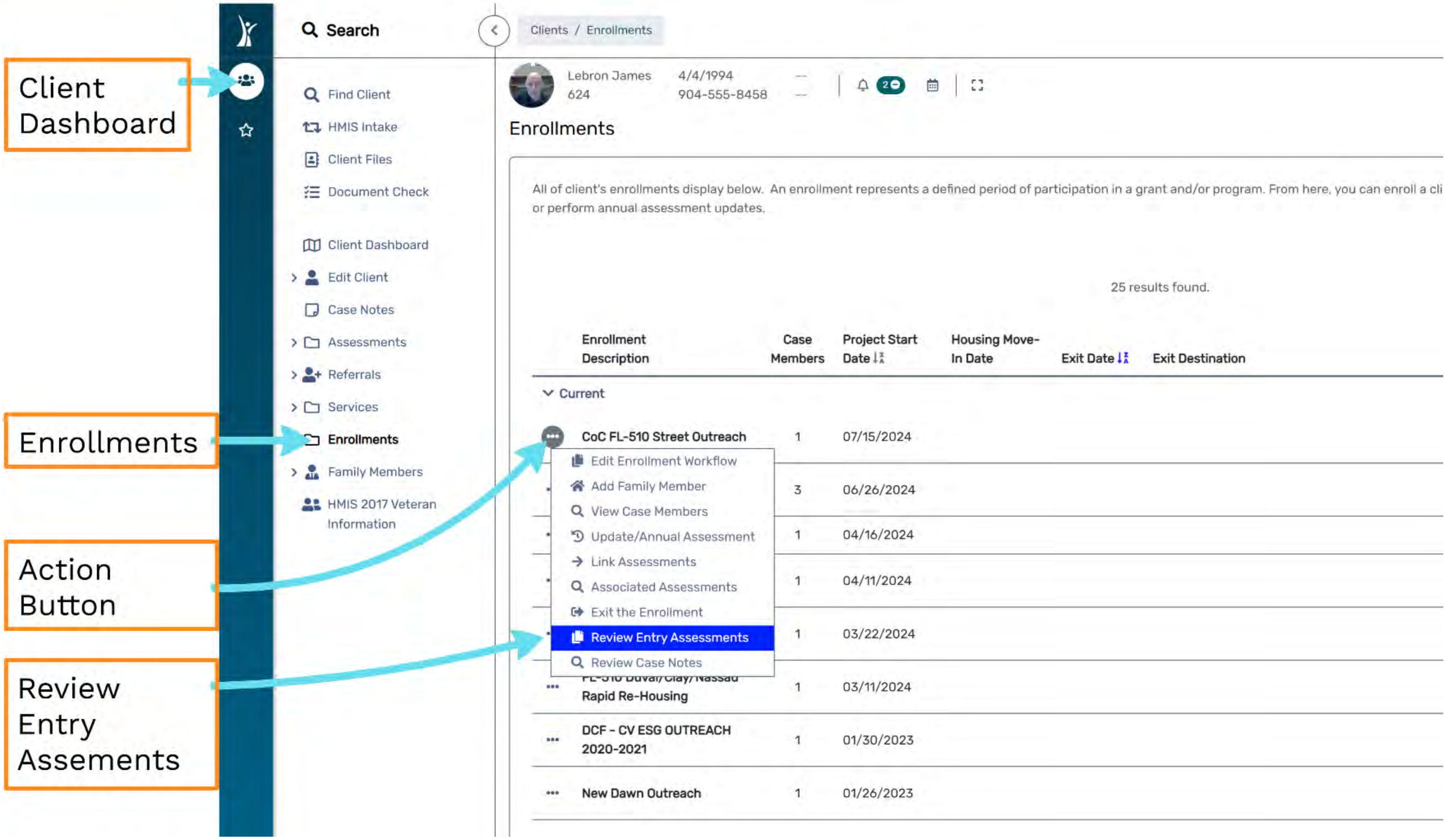
Step 2: Select the "Enrollments" secondary sidebar* menu option. ClientTrack will navigate to the "Enrollments" workspace container.

** 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".*

Step 3: Select the action button* next to the appropriate enrollment. Select "Review Entry Assessments." If a client has been exited from the program, there will be an additional option to select "Review Exit Assessments." ClientTrack will navigate to the "Assessment Status" workspace container of the applicable selection.

** 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".*

This will display all the individual assessments that were completed as part of the Intake/Enrollment Workflow for that client. For minors (under 18), fewer assessments are required.

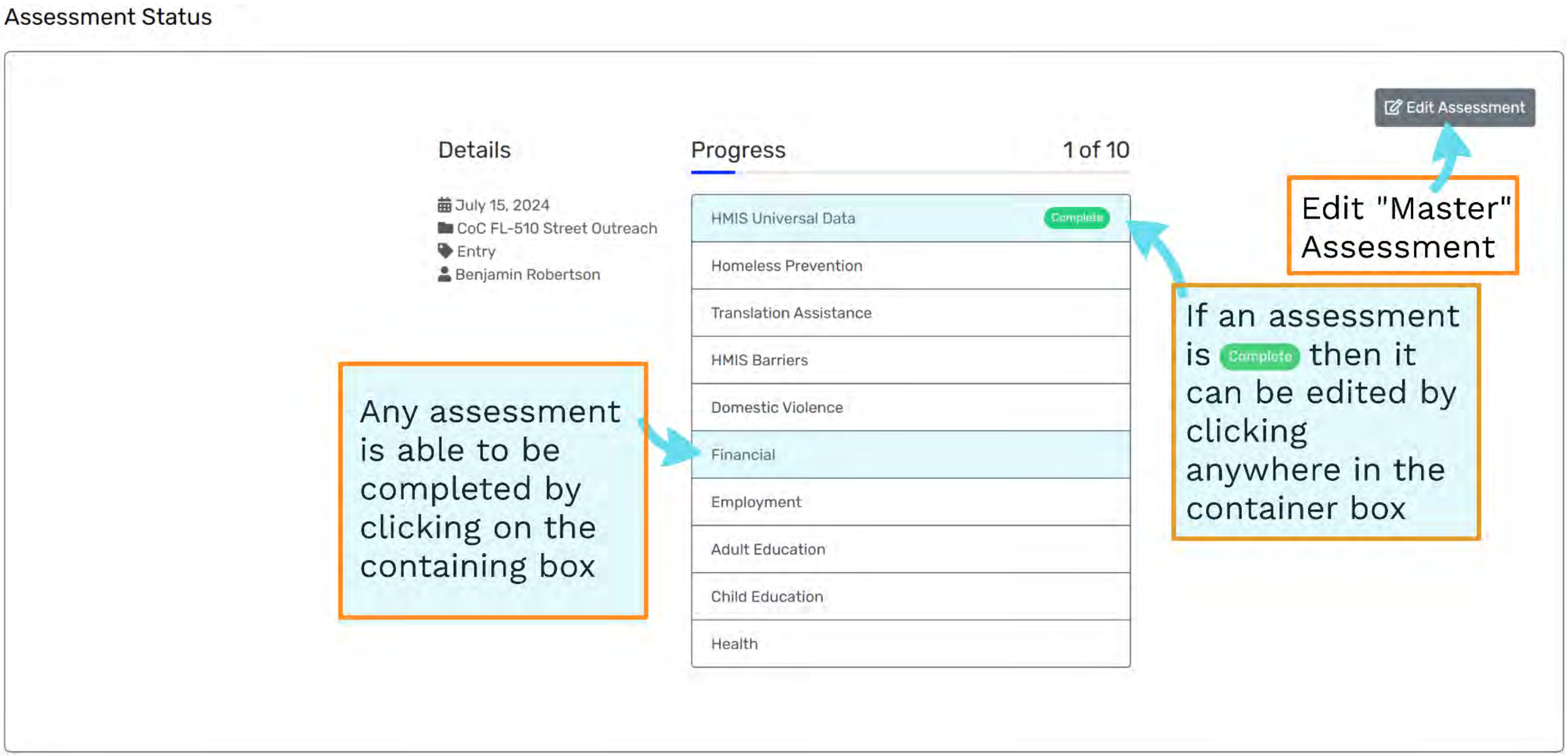


All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a cli or perform annual assessment updates.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination
CoC FL-510 Street Outreach	1	07/15/2024			
	3	06/26/2024			
	1	04/16/2024			
	1	04/11/2024			
	1	03/22/2024			
FL-510 Duval/Clay/Nassau Rapid Re-Housing	1	03/11/2024			
DCF - CV ESG OUTREACH 2020-2021	1	01/30/2023			
New Dawn Outreach	1	01/26/2023			

Figure 4-84 – Review Client Entry Assessments

Step 4: Click the “Edit Assessment” box in the top right corner of the screen. Once the box has been selected, ClientTrack will navigate to the “Master Assessment” form in the workspace container.



Assessment Status

Details

July 15, 2024
CoC FL-510 Street Outreach
Entry
Benjamin Robertson

Progress 1 of 10

- HMIS Universal Data Complete
- Homeless Prevention
- Translation Assistance
- HMIS Barriers
- Domestic Violence
- Financial
- Employment
- Adult Education
- Child Education
- Health

Edit "Master" Assessment

If an assessment is Complete then it can be edited by clicking anywhere in the container box

Any assessment is able to be completed by clicking on the containing box

Figure 4-85 – Editing/Completing Entry Assessments

Viewing List of Client’s Related Assessments

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".*

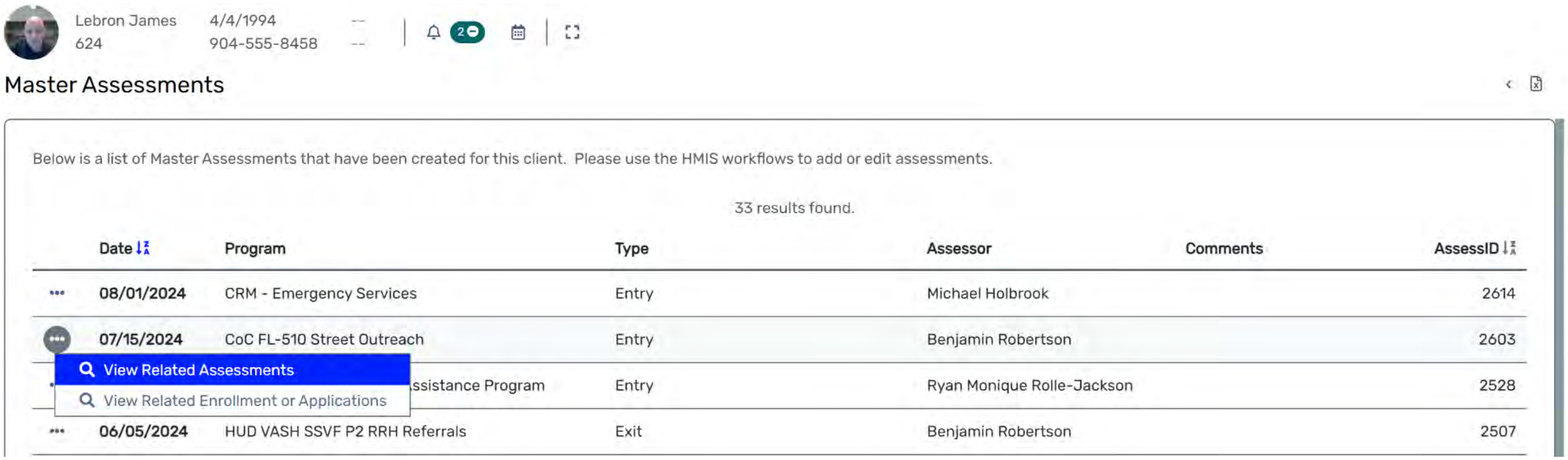
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

Step 2: Select the "Assessments" secondary sidebar* menu option. ClientTrack will navigate to the "Master Assessments" workspace container, and a dropdown menu will appear under the "Assessments" folder. This will display a list of all "Master Assessment" workflows (Entry, Annual, During Program Enrollment, Exit).

** 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".*

Step 3: Click on the action button* next to the Master Assessment. Select "View Related Assessments" from the dropdown menu to see a list of which individual assessments within the "Master Assessment" have been completed. The assessments with a green Complete have been completed.

** 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".*



Lebron James
624

4/4/1994
904-555-8458

--
--

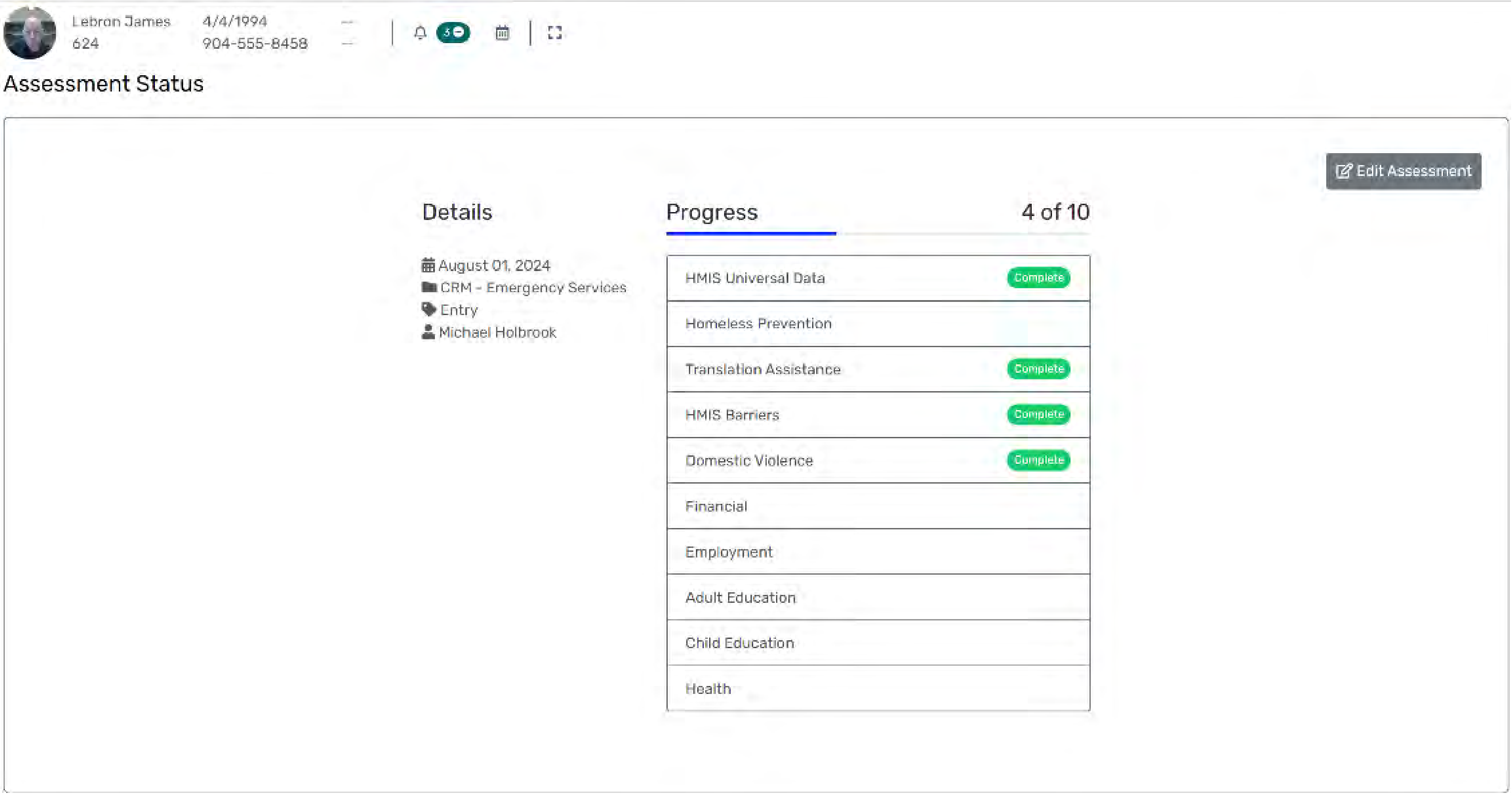
Master Assessments

Below is a list of Master Assessments that have been created for this client. Please use the HMIS workflows to add or edit assessments.

33 results found.

Date	Program	Type	Assessor	Comments	AssessID
08/01/2024	CRM - Emergency Services	Entry	Michael Holbrook		2614
07/15/2024	CoC FL-510 Street Outreach	Entry	Benjamin Robertson		2603
	ssistance Program	Entry	Ryan Monique Rolle-Jackson		2528
06/05/2024	HUD VASH SSVF P2 RRH Referrals	Exit	Benjamin Robertson		2507

Figure 4-86 – View Related Assessments



Assessment Status

Details

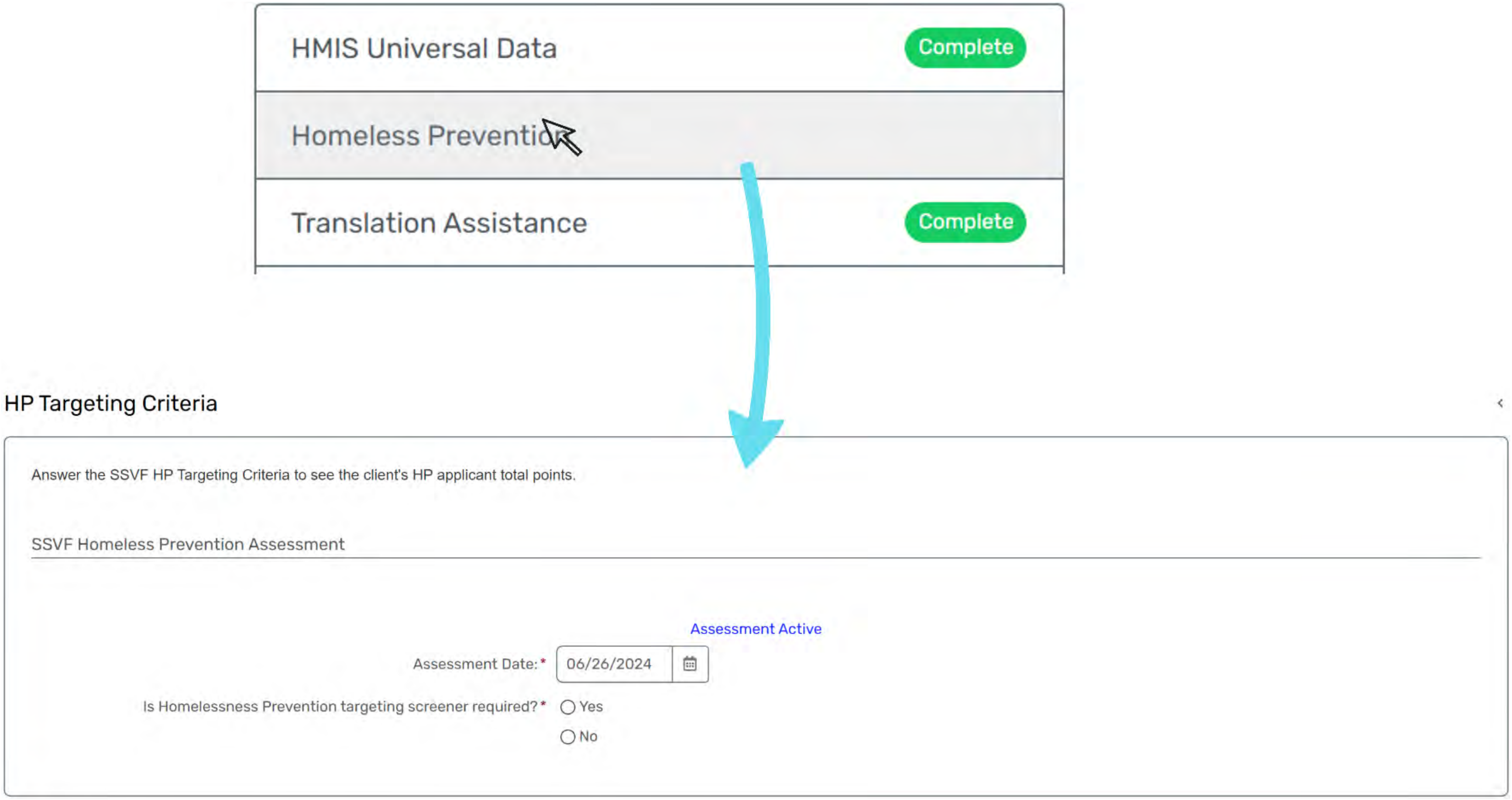
August 01, 2024
CRM - Emergency Services
Entry
Michael Holbrook

Progress 4 of 10

HMIS Universal Data	Complete
Homeless Prevention	
Translation Assistance	Complete
HMIS Barriers	Complete
Domestic Violence	Complete
Financial	
Employment	
Adult Education	
Child Education	
Health	

Figure 4-87 – Related Assessments

Step 6: Click anywhere in box of an assessment to have the window pop open the assessment.



HP Targeting Criteria

Answer the SSVF HP Targeting Criteria to see the client's HP applicant total points.

SSVF Homeless Prevention Assessment

Assessment Active

Assessment Date:* 06/26/2024

Is Homelessness Prevention targeting screener required?* ○ Yes ○ No

Figure 4-88 – Click to Open a Related Assessment

Annual Assessments

"Annual Assessment(s)" is a "Master Assessment"* that is required for clients who have been enrolled in a Coordinated Entry** program every 365 days or longer. Annual assessments are performed +/- 30 days of anniversary of the client's project entry date. For more information on Annual Assessments for program specific requirements, reach out to a supervisor or to hmis@changinghomelessness.org.

** For instructions on how to view a list of "Master Assessments", see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/ View List of Client's Master Assessments*

*** For information regarding online resources, as well as where to find specific Federal HUD programs, see Introduction/Online Resources in the "HMIS Basic User 2025 Manual".*

Initiating Annual Assessments via the Enrollments Folder

This is method 1* of 2 on initiating Annual Assessments**.

** For information and instructions on how to initiate an Annual Assessment via the Current Enrollment w/Most Recent Assessment subfolder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Annual Assessments/Initiating Annual Assessments via the Current Enrollment w/Most Recent Assessment Subfolder*

*** For information on editing assessments, see Chapter 5: Basics of Entering Data into ClientTrack/Editing an Existing Enrollment: Editing Assessments*

Steps to Initiate Annual Assessments via the Enrollments Folder

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".*

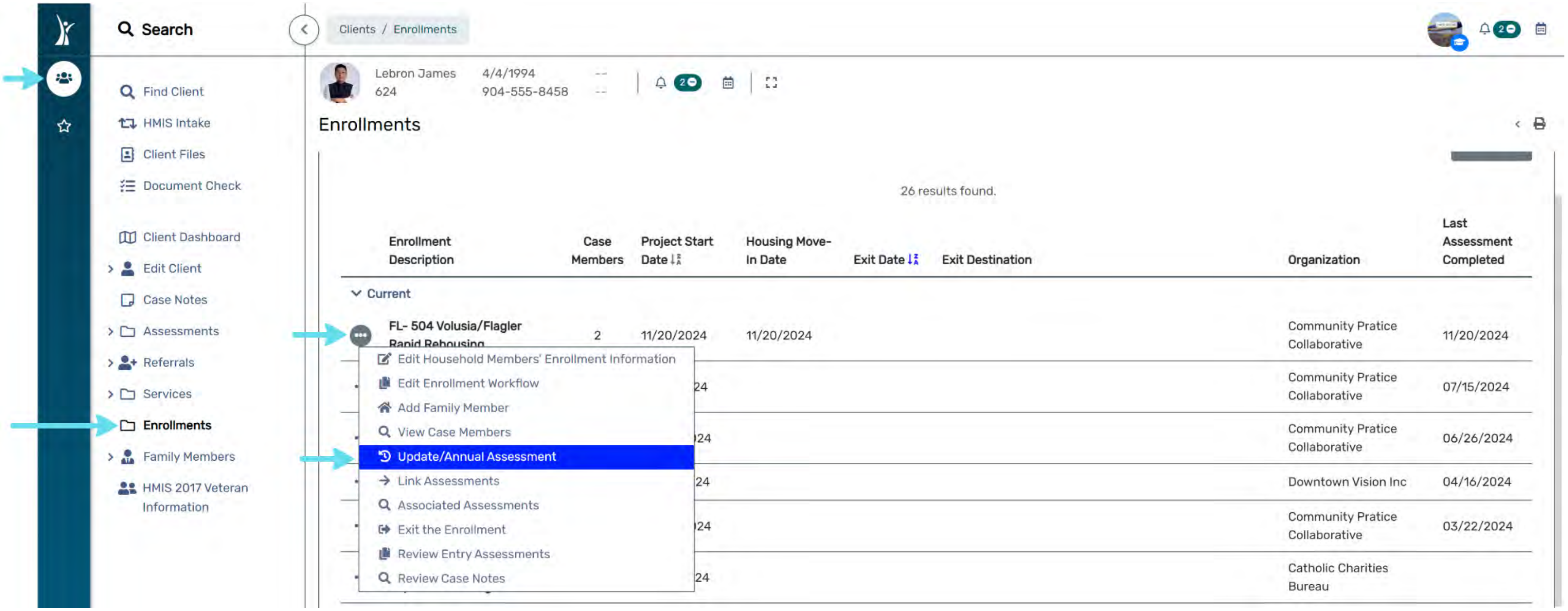
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

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".*

Step 3: Click the action button*. Click "Update/Annual Assessment". ClientTrack will navigate to the "HUD Program Enrollment" workflow step in the "Assessment For Enrollment" workspace container.

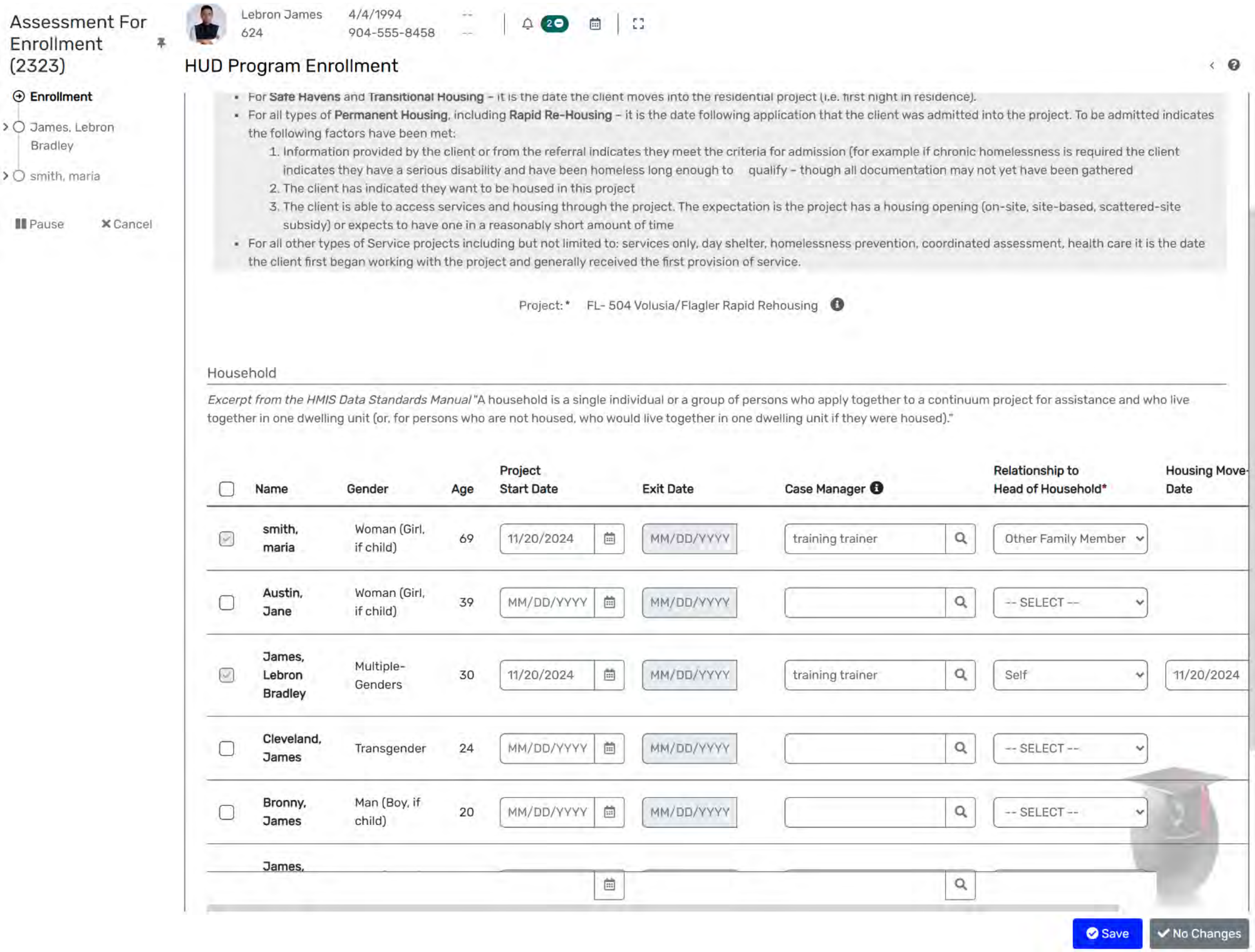
** To view a list of icons and buttons used in Client Track HMIS, see Chapter 1: HMIS ClientTrack Basics/Key Terminology and Navigation/Icons and Buttons in the "HMIS Basic User 2025 Manual".*



Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
FL- 504 Volusia/Flagler Rapid Rehousing	2	11/20/2024	11/20/2024			Community Pratice Collaborative	11/20/2024
		24				Community Pratice Collaborative	07/15/2024
		24				Community Pratice Collaborative	06/26/2024
		24				Downtown Vision Inc	04/16/2024
		24				Community Pratice Collaborative	03/22/2024
		24				Catholic Charities Bureau	

Figure 4-89 – Annual Assessment via Enrollments Folder

Step 4: Verify the household enrollment members. Click “No Changes” if no enrollment changes were made. If any information is updated, click the “Save” button. After clicking “No Changes” or “Save”, ClientTrack will navigate to the “Type of Assessment” workflow step in the “Assessment For Enrollment” workspace container.



Assessment For Enrollment (2323)

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

HUD Program Enrollment

- 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:* FL- 504 Volusia/Flagler Rapid Rehousing

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)."

☐	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*	Housing Move- Date
☑	**smith, maria**	Woman (Girl, if child)	69	11/20/2024	MM/DD/YYYY	training trainer	Other Family Member	
☐	**Austin, Jane**	Woman (Girl, if child)	39	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
☑	**James, Lebron Bradley**	Multiple-Genders	30	11/20/2024	MM/DD/YYYY	training trainer	Self	11/20/2024
☐	**Cleveland, James**	Transgender	24	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
☐	**Bronny, James**	Man (Boy, if child)	20	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
	James,							

Figure 4-90 – Annual Assessment – HUD Program Enrollment

Step 5: Click “New Annual Assessment”. ClientTrack will navigate to the “Universal Data Assessment” workflow step in the “Assessment For Enrollment” workspace container.

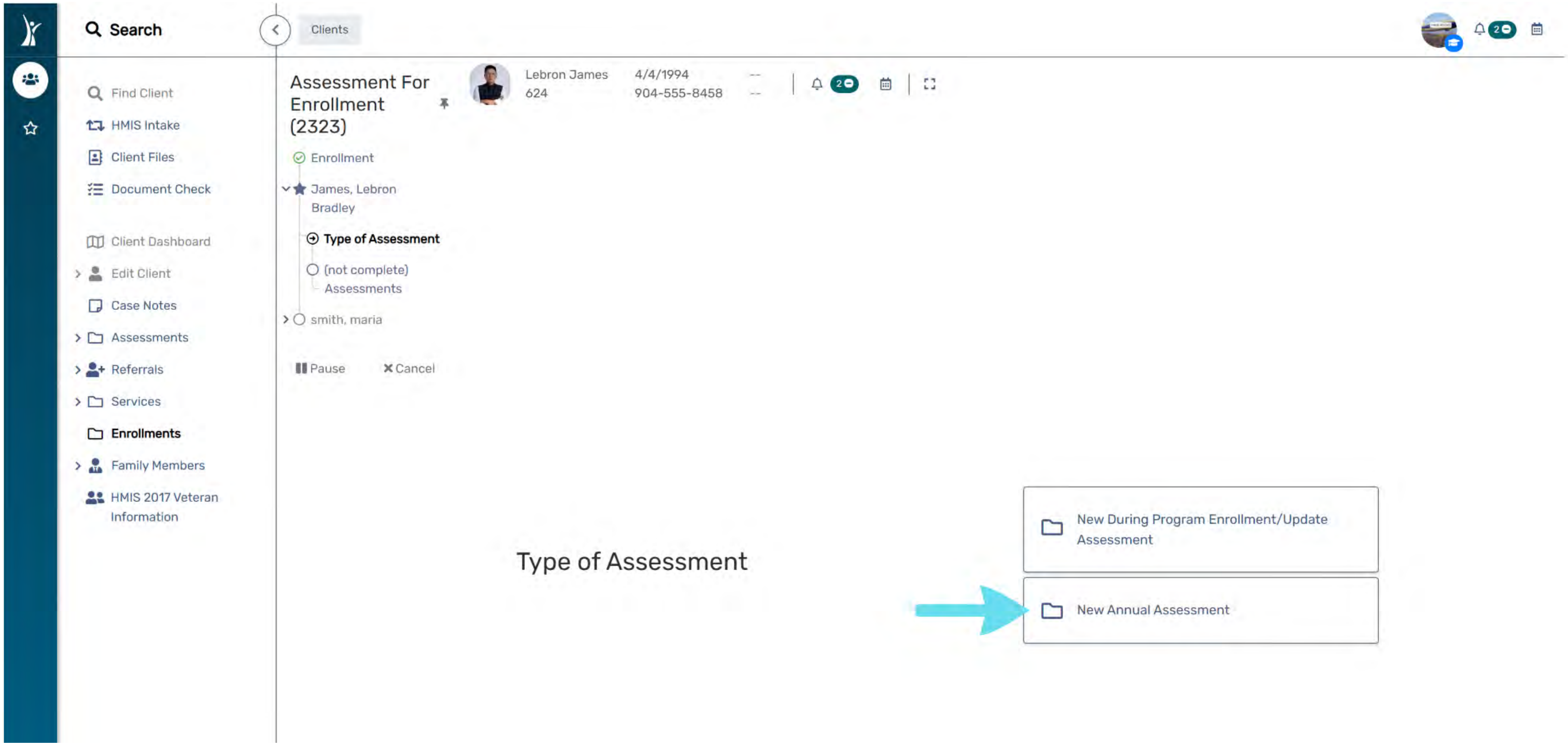


Figure 4-91 – Type of Assessment Annual Assessment Workflow Step

Step 6: Complete the assessment as applicable per the program’s requirements.

Initiating Annual Assessments via the Current Enrollment w/Most Recent Assessment Subfolder

This is method 2* of 2 on initiating Annual Assessments**.

** For information and instructions on how to initiate an Annual Assessment via the Current Enrollment w/Most Recent Assessment subfolder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder/Annual Assessments/Initiating Annual Assessments via the Enrollments Folder*

*** For information on editing assessments, see Chapter 5: Basics of Entering Data into ClientTrack/Editing an Existing Enrollment: Editing Assessments*

Steps to Initiate Annual Assessments via the Current Enrollment w/Most Recent Assessment subfolder

Step 1: Navigate to the Home 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 “My ClientTrack” secondary sidebar* menu option. A dropdown menu will appear under the “My ClientTrack” folder.

** 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”.*

Step 3: Select the “Current Enrollments” secondary sidebar menu option. A dropdown menu will appear under the “Current Enrollments” subfolder.

Step 4: Select the “Current Enrollments w/ Most Recent Assessment” secondary sidebar menu option. ClientTrack will navigate to the “Current Enrollments w/ Most Recent Assessment” workspace container.

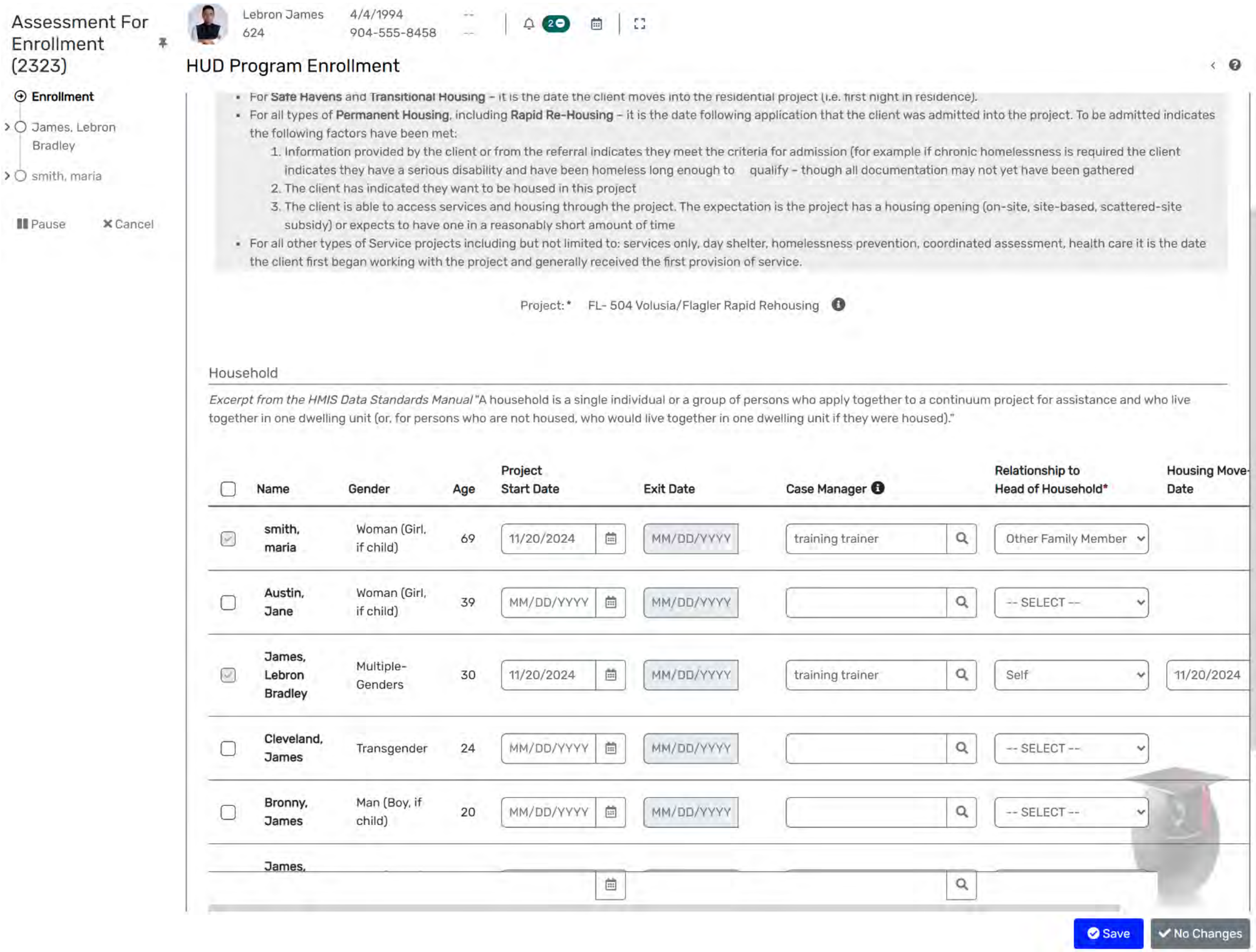
Step 5: Navigate to the applicable client(s) by scrolling or using the search criteria*.

** For information on using the Current Enrollment w/Most Recent Assessment Subfolder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/My ClientTrack: Folder/Current Enrollments: Subfolder/Current Enrollments w/ Most Recent Assessment: Subfolder.*

Step 6: Select the "Perform Annual Assessment" copy icon. * ClientTrack will navigate to the "HUD Program Enrollment" workflow step in the "Assessment For Enrollment" 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".*

Step 7: Verify the household enrollment members. Click "No Changes" if no enrollment changes were made. If any information is updated, click the "Save" button. After clicking "No Changes" or "Save", ClientTrack will navigate to the "Type of Assessment" workflow step in the "Assessment For Enrollment" workspace container.



HUD Program Enrollment

- 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:* FL- 504 Volusia/Flagler Rapid Rehousing

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)."

☐	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*	Housing Move-Date
☑	**smith, maria**	Woman (Girl, if child)	69	11/20/2024	MM/DD/YYYY	training trainer	Other Family Member	
☐	**Austin, Jane**	Woman (Girl, if child)	39	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
☑	**James, Lebron Bradley**	Multiple-Genders	30	11/20/2024	MM/DD/YYYY	training trainer	Self	11/20/2024
☐	**Cleveland, James**	Transgender	24	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
☐	**Bronny, James**	Man (Boy, if child)	20	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	
	James,							

Figure 4-92 – Annual Assessment – HUD Program Enrollment

Step 8: Click “New Annual Assessment”.   ClientTrack will navigate to the “Universal Data Assessment” workflow step in the “Assessment For Enrollment” workspace container.

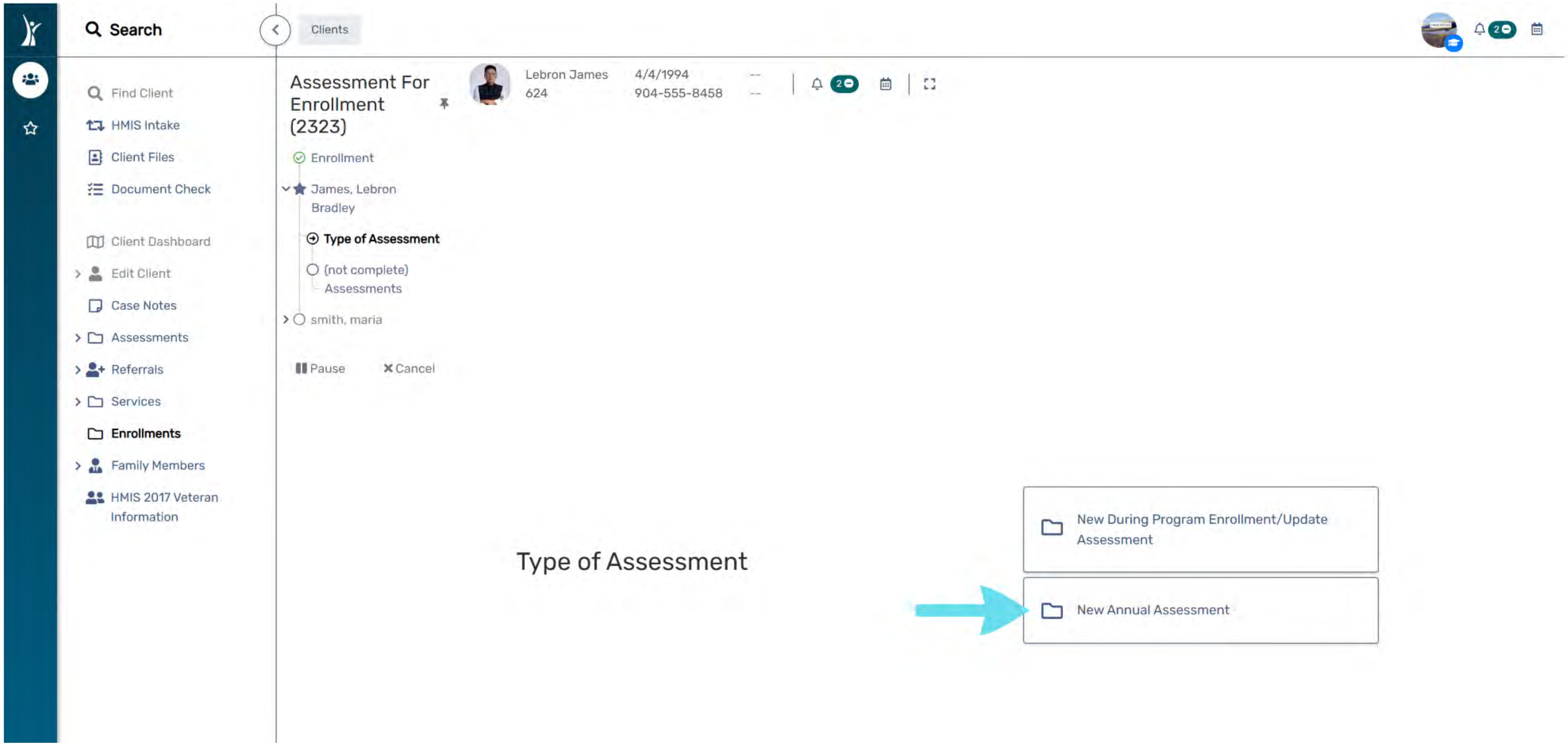
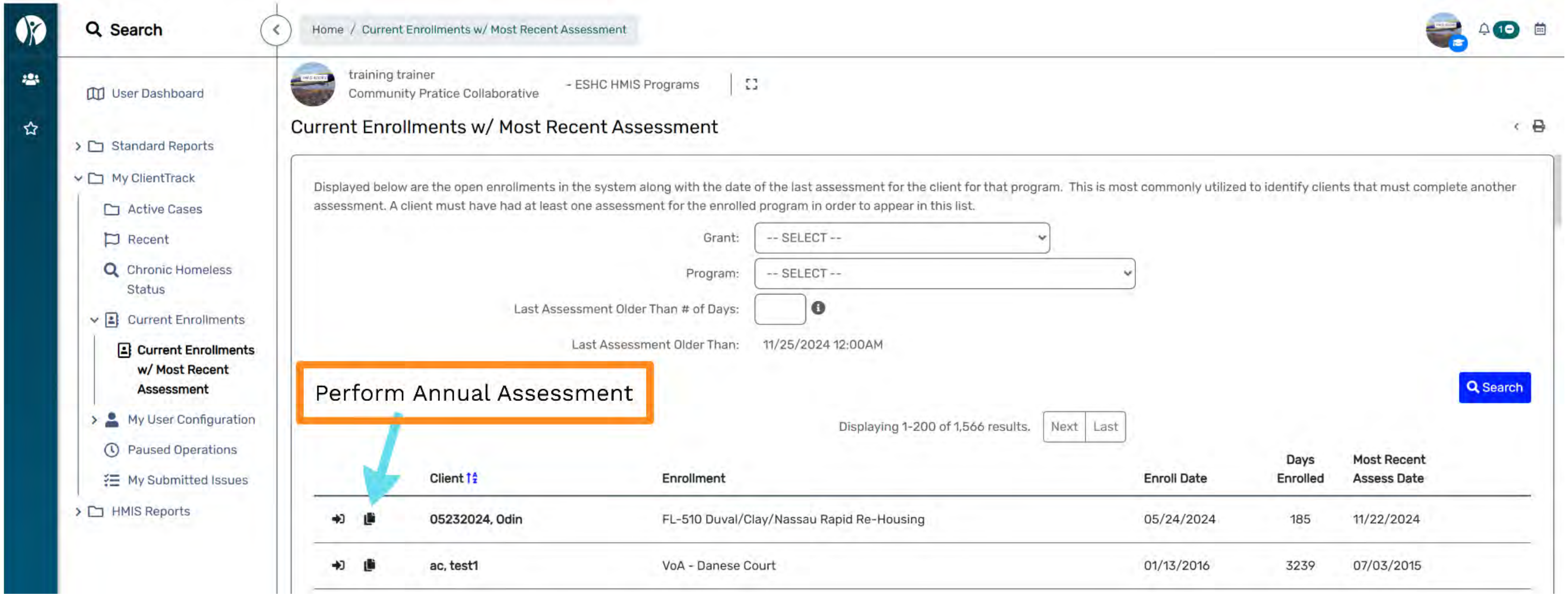


Figure 4-93 – Type of Assessment Annual Assessment Workflow Step

Step 6: Complete the assessment as applicable per the program’s requirements. For more information on how to perform annual assessments, reach out to hmis@changinghomelessness.net.



Current Enrollments w/ Most Recent Assessment

Displayed below are the open enrollments in the system along with the date of the last assessment for the client for that program. This is most commonly utilized to identify clients that must complete another assessment. A client must have had at least one assessment for the enrolled program in order to appear in this list.

Grant: -- SELECT --

Program: -- SELECT --

Last Assessment Older Than # of Days:

Last Assessment Older Than: 11/25/2024 12:00AM

Displaying 1-200 of 1,566 results.

Client	Enrollment	Enroll Date	Days Enrolled	Most Recent Assess Date
05232024, Odin	FL-510 Duval/Clay/Nassau Rapid Re-Housing	05/24/2024	185	11/22/2024
ac, test1	VoA - Danese Court	01/13/2016	3239	07/03/2015

Figure 4-94 – Perform Annual Assessment Icon

Referrals: Folder

Referrals in ClientTrack allow users to refer and track referrals for clients to applicable agencies/organizations. Referrals include creating new referrals*, accepting referrals**, and recording accepted referrals***.

** For instructions on creating new referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/Referrals – Referrer – Creating New Referrals in the “HMIS Basic User 2025 Manual”.*

*** For instructions on accepting referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/Referrals - Service Provider – Accepting Referrals in the “HMIS Basic User 2025 Manual”.*

**** For instructions on recording referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/*Referrals – Referrer - Recording Accepted Referral *in the “HMIS Basic User 2025 Manual”.*

Referrals – Referrer – Creating New Referrals

This section is section 1 of 3 regarding creating referrals, accepting referrals*, and recording accepted referrals**.

** For instructions on accepting referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/Referrals - Service Provider – Accepting Referrals in the “HMIS Basic User 2025 Manual”.*

*** For instructions on recording accepted referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/*Referrals – Referrer - Recording Accepted Referral *in the “HMIS Basic User 2025 Manual”.*

Steps to Creating New Referrals via the Referrals Folder

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”.*

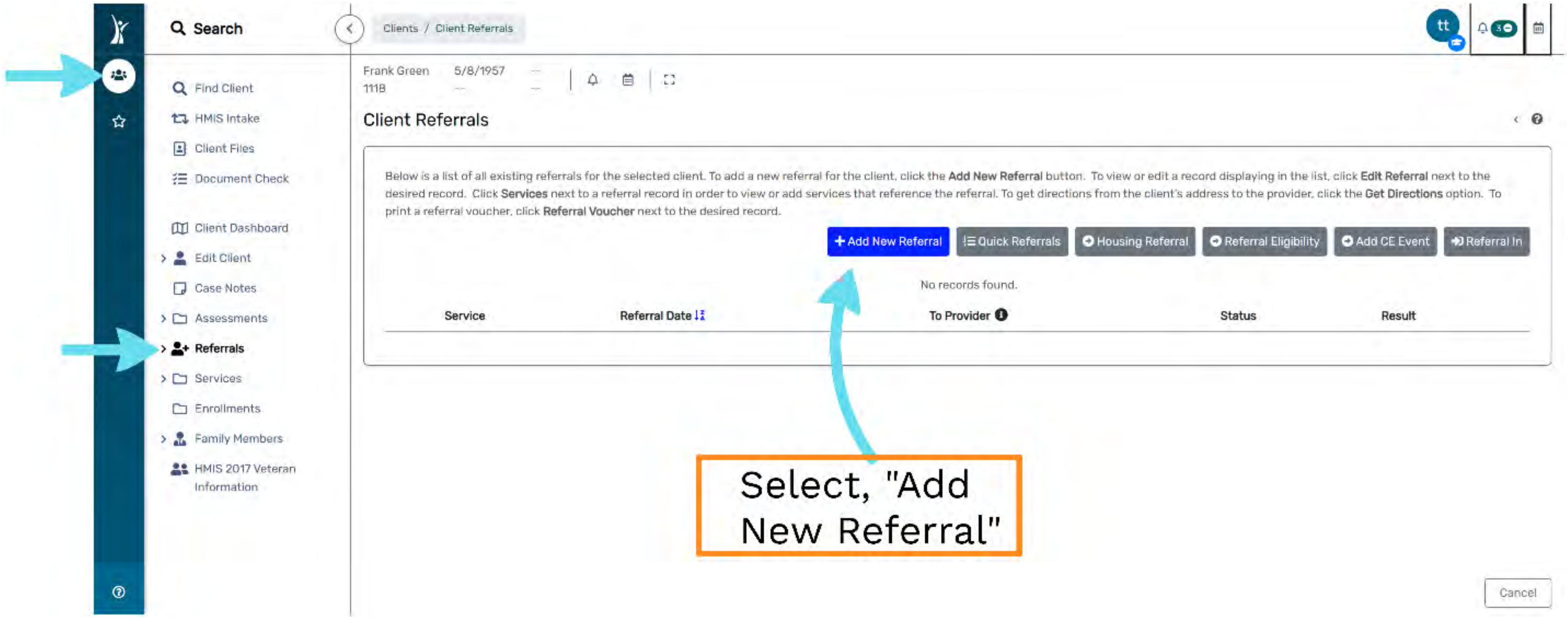
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** 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 “Referrals” secondary sidebar menu option. ClientTrack will navigate to the “Client Referrals” workspace container, and a dropdown menu will appear under the “Referrals” folder.

**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”.*

Step 3: Click, “Add New Referral” from the referral container space. ClientTrack will navigate to the “Referral” workspace container.



Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New Referral** button. To view or edit a record displaying in the list, click **Edit Referral** next to the desired record. Click **Services** next to a referral record in order to view or add services that reference the referral. To get directions from the client's address to the provider, click the **Get Directions** option. To print a referral voucher, click **Referral Voucher** next to the desired record.

No records found.

Service	Referral Date	To Provider	Status	Result

Figure 4-95 – Add New Referral

Step 4: Select a Referral Date, Referral Service.

Step 5: Search and select a “Refer to Provider”

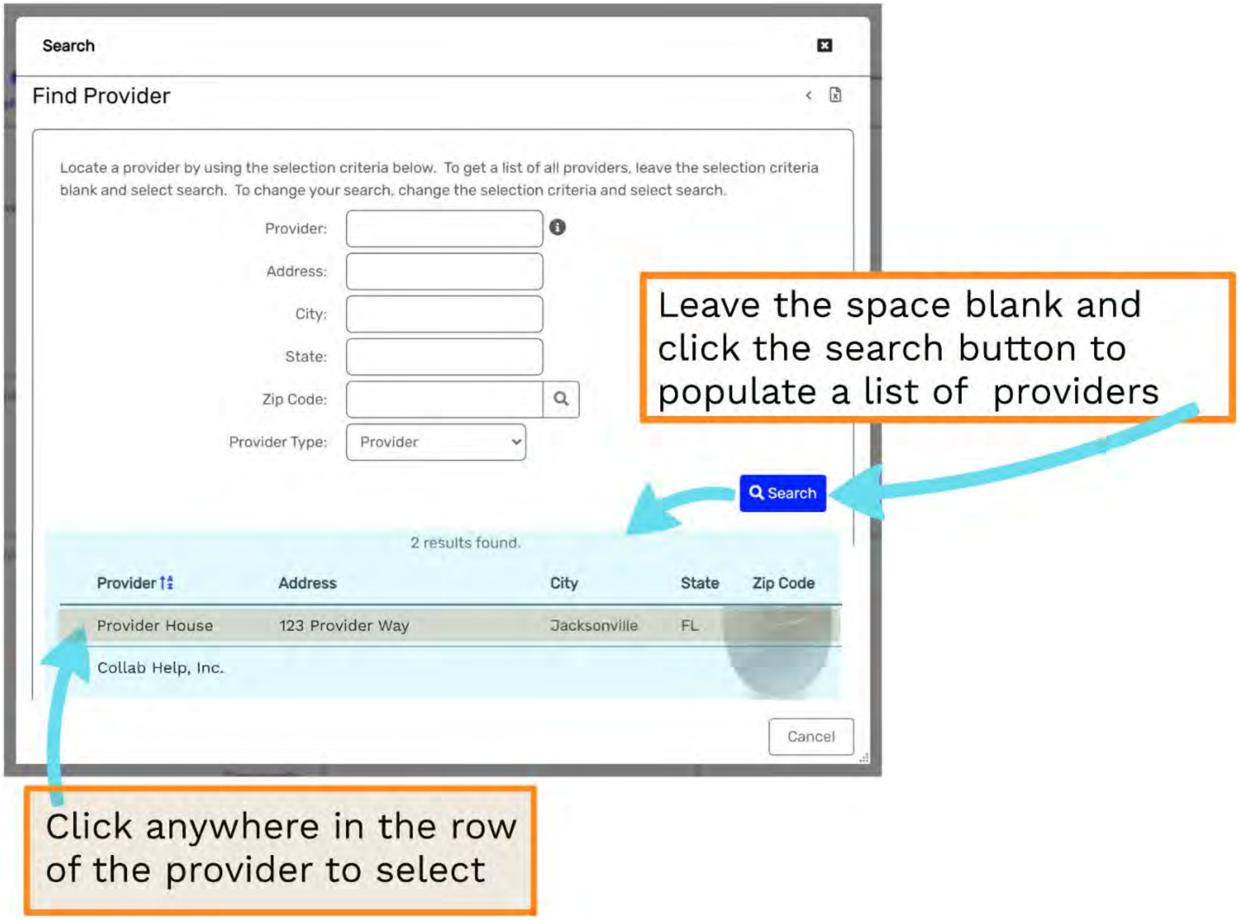
Referral Recipient

Select the agency referral recipient as the Refer to Provider.

Refer to Provider: *

Leave the space blank and click the search icon

Figure 4-96 – Adding New Referrals – Search “Refer to Provider”



Locate a provider by using the selection criteria below. To get a list of all providers, leave the selection criteria blank and select search. To change your search, change the selection criteria and select search.

Provider:

Address:

City:

State:

Zip Code:

Provider Type: Provider

2 results found.

Provider	Address	City	State	Zip Code
Provider House	123 Provider Way	Jacksonville	FL	
Collab Help, Inc.				

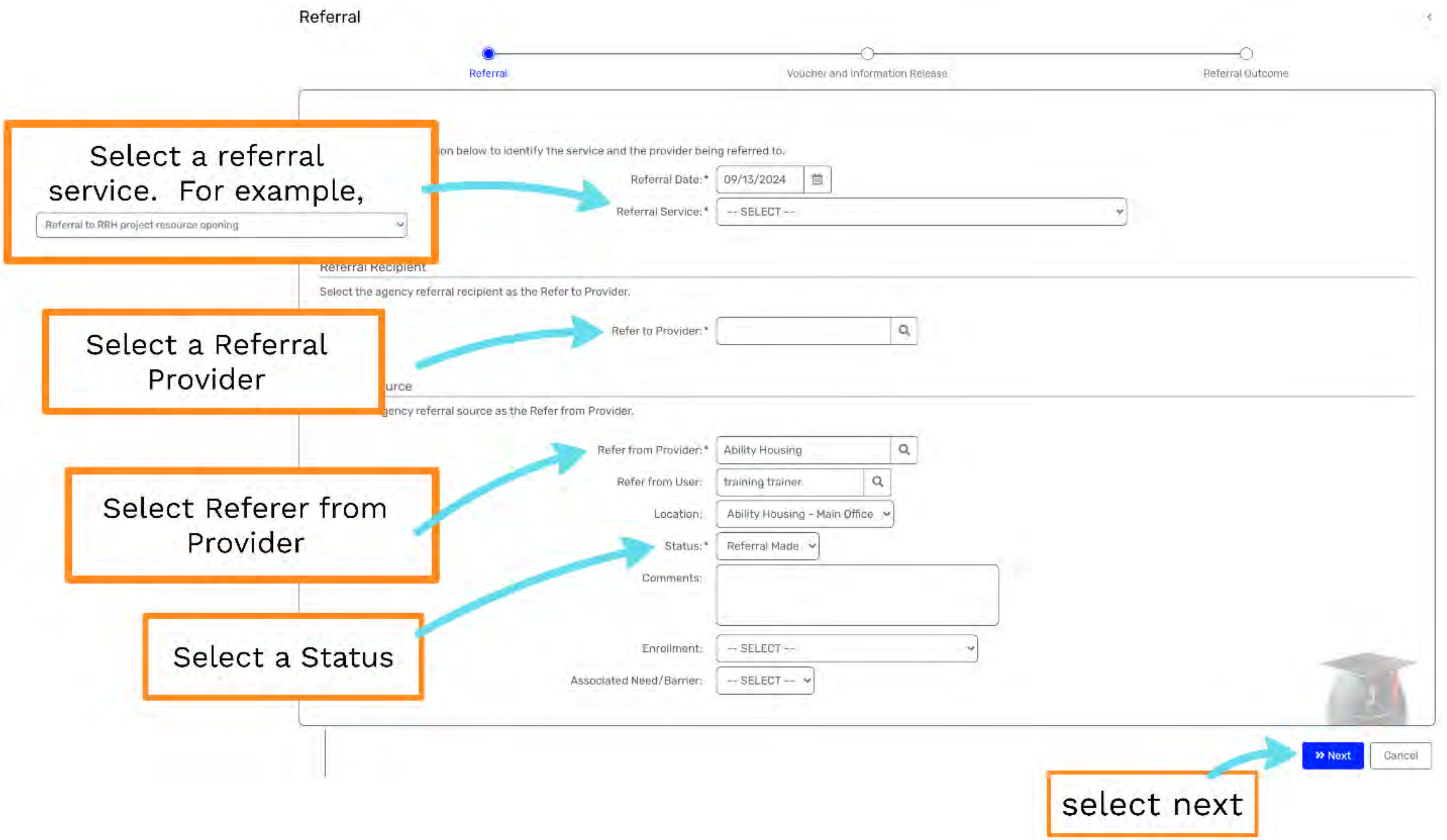
Leave the space blank and click the search button to populate a list of providers

Click anywhere in the row of the provider to select

Figure 4-97 – Find Referral Provider

Step 6: Select a “Refer from Provider” and a “Status”

Step 7: Fill out any additional information if applicable. Required elements are marked with a (*). Click “Next” if the information is complete and correct or click “Cancel” to exit without saving. ClientTrack will navigate to the “Voucher and Information Release” step in the “Referral” workspace container.



Referral

ion below to identify the service and the provider being referred to.

Referral Date:* 09/13/2024

Referral Service:* -- SELECT --

Referral Recipient

Select the agency referral recipient as the Refer to Provider.

Refer to Provider:*

urce

gency referral source as the Refer from Provider.

Refer from Provider:* Ability Housing

Refer from User: training trainer

Location: Ability Housing - Main Office

Status:* Referral Made

Comments:

Enrollment: -- SELECT --

Associated Need/Barrier: -- SELECT --

Select a referral service. For example, Referral to RRH project resource opening

Select a Referral Provider

Select Referer from Provider

Select a Status

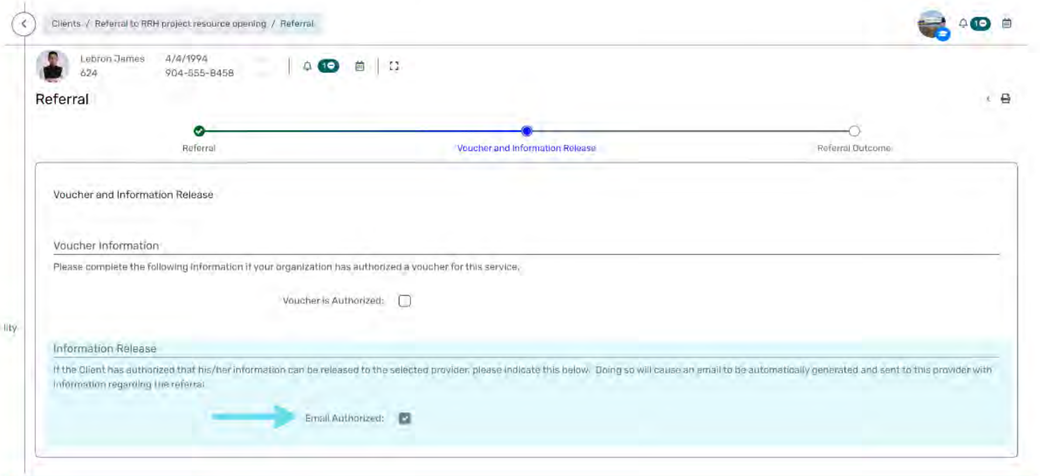
select next

Figure 4-98 – Filling Referral Form

Step 8: “Voucher and Information Release”. Fill out any additional information if applicable. Select the “Previous” button to make changes on previous pages if applicable. Click “Next” to proceed to the next page or click “Cancel” to exit without saving. ClientTrack will navigate to the “Referral Outcome” step in the “Referral” workspace container.

Tips and Tricks - *Email Authorized Clients to Referring Agency*

- Select "Email Authorized" on the "Voucher and Information Release" referral form step for ClienTrack to automatically draft an email to send to a provider to alert them of the new referral.



Voucher and Information Release

Voucher Information

Please complete the following information if your organization has authorized a voucher for this service.

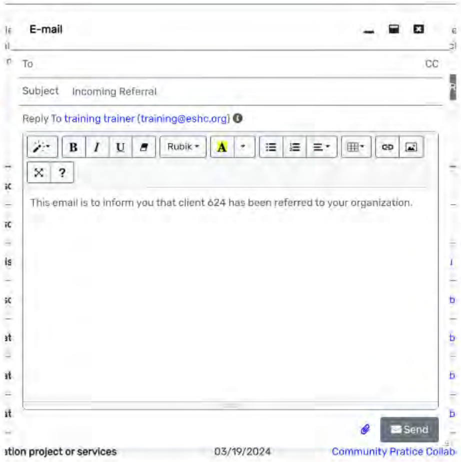
Voucher is Authorized: ☐

Information Release

If the Client has authorized that his/her information can be released to the selected provider, please indicate this below. Doing so will cause an email to be automatically generated and sent to this provider with information regarding the referral.

Email Authorized: ☑

- After the last step of the referral forms is completed, a pop-up window will appear with an edtiable automated message. Many any applicable changes if neccessary and click "Send" to sent



Subject Incoming Referral

Reply To training trainer (training@eshc.org)

This email is to inform you that client 624 has been referred to your organization.

ation project or services 03/19/2024 Community Pratice Collab

Figure 4-99 – Tips and Tricks – Referrals – Emailing Authorized Clients to Referring Agency

Step 9: “Referral”. Fill out any additional information if applicable. Select the “Previous” button to make changes on previous pages if applicable. Click “Finish” if the information is complete and correct or click “Cancel” to exit without saving. ClientTrack will navigate to the “Client Referrals” workspace container. The created referral will be visible in the “Client Referrals” workspace container.

Referrals - Service Provider – Accepting Referrals

This section is section 2 of 3 regarding creating referrals*, accepting referrals, and recording accepted referrals**.

** For instructions on creating new referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/Referrals – Referrer – Creating New Referrals in the “HMIS Basic User 2025 Manual”.*

*** For instructions on recording accepted referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/*Referrals – Referrer - Recording Accepted Referral *in the “HMIS Basic User 2025 Manual”.*

Steps to Accepting Referrals via the Referrals Folder

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”.*

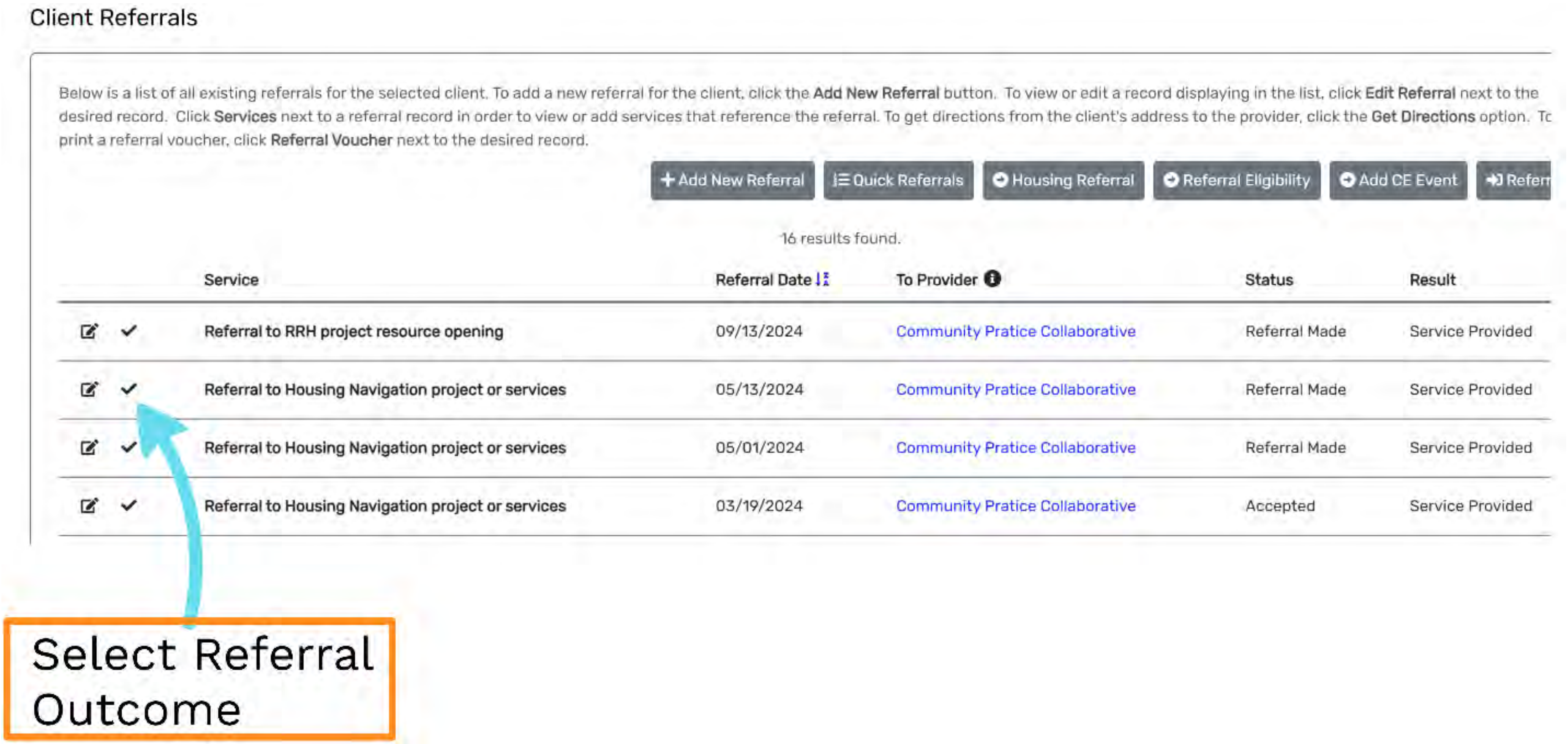
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Referrals” secondary sidebar menu option. ClientTrack will navigate to the “Client Referrals” workspace container, and a dropdown menu will appear under the “Referrals” folder.

** 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”.*

Step 3: Click the “Referral Outcome” check mark icon next to appropriate referral. ClientTrack will navigate to the “Voucher and Information Release” step in the “Referral” 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”.*



Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New Referral** button. To view or edit a record displaying in the list, click **Edit Referral** next to the desired record. Click **Services** next to a referral record in order to view or add services that reference the referral. To get directions from the client's address to the provider, click the **Get Directions** option. Tc print a referral voucher, click **Referral Voucher** next to the desired record.

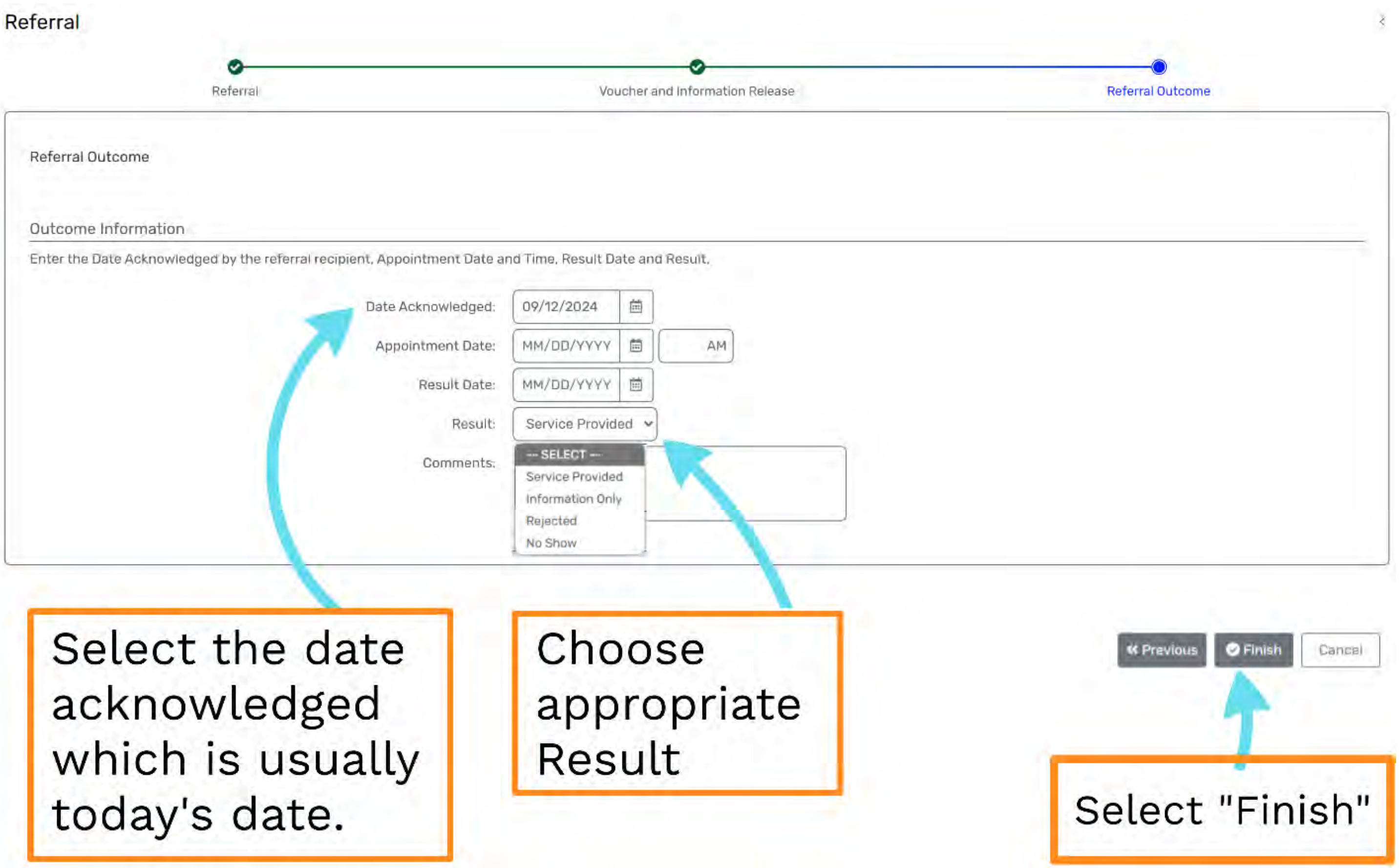
16 results found.

		Service	Referral Date	To Provider	Status	Result
✎	✓	Referral to RRH project resource opening	09/13/2024	Community Pratice Collaborative	Referral Made	Service Provided
✎	✓	Referral to Housing Navigation project or services	05/13/2024	Community Pratice Collaborative	Referral Made	Service Provided
✎	✓	Referral to Housing Navigation project or services	05/01/2024	Community Pratice Collaborative	Referral Made	Service Provided
✎	✓	Referral to Housing Navigation project or services	03/19/2024	Community Pratice Collaborative	Accepted	Service Provided

Figure 4-100 – Selecting Referral Outcome

Step 4: Select the date acknowledged (usually the current date) and select a result (Ex. “Service Provided”).

Step 5: Fill out any additional information if applicable. Click “Previous” to return and edit/verify information from the previous page. Click “Finish” if the information is correct or click “Cancel” to exit without saving. ClientTrack will navigate to the “Client Referrals” workspace container.



Referral Outcome

Outcome Information

Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged: 09/12/2024

Appointment Date: MM/DD/YYYY AM

Result Date: MM/DD/YYYY

Result: Service Provided

Comments:

Select the date acknowledged which is usually today's date.

Choose appropriate Result

Select "Finish"

Figure 4-101 – Referral Outcome Page

Referrals – Referrer - Recording Accepted Referral

This section is section 3 of 3 regarding creating referrals*, accepting referrals**, and recording accepted referrals.

** For instructions on creating new referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/Referrals – Referrer – Creating New Referrals in the "HMIS Basic User 2025 Manual".*

*** For instructions on accepting referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/Referrals - Service Provider – Accepting Referrals in the "HMIS Basic User 2025 Manual".*

Steps to Recording Accepted Referrals via the Referrals Folder

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".*

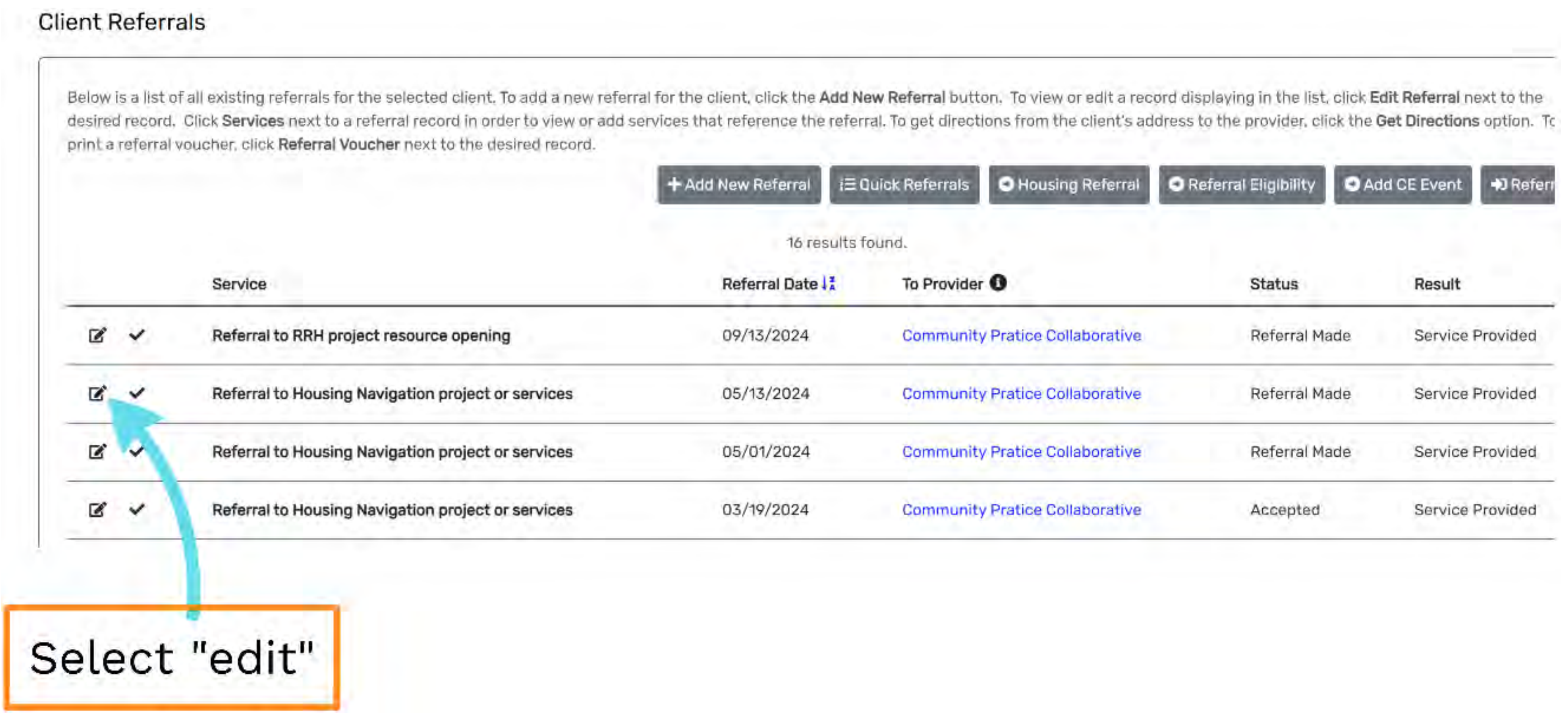
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

Step 2: Select the "Referrals" secondary sidebar menu option. ClientTrack will navigate to the "Client Referrals" workspace container, and a dropdown menu will appear under the "Referrals" folder.

** 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".*

Step 3: Click the edit icon next to appropriate referral. ClientTrack will navigate to the "Referral" 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".*



Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New Referral** button. To view or edit a record displaying in the list, click **Edit Referral** next to the desired record. Click **Services** next to a referral record in order to view or add services that reference the referral. To get directions from the client's address to the provider, click the **Get Directions** option. Tc print a referral voucher, click **Referral Voucher** next to the desired record.

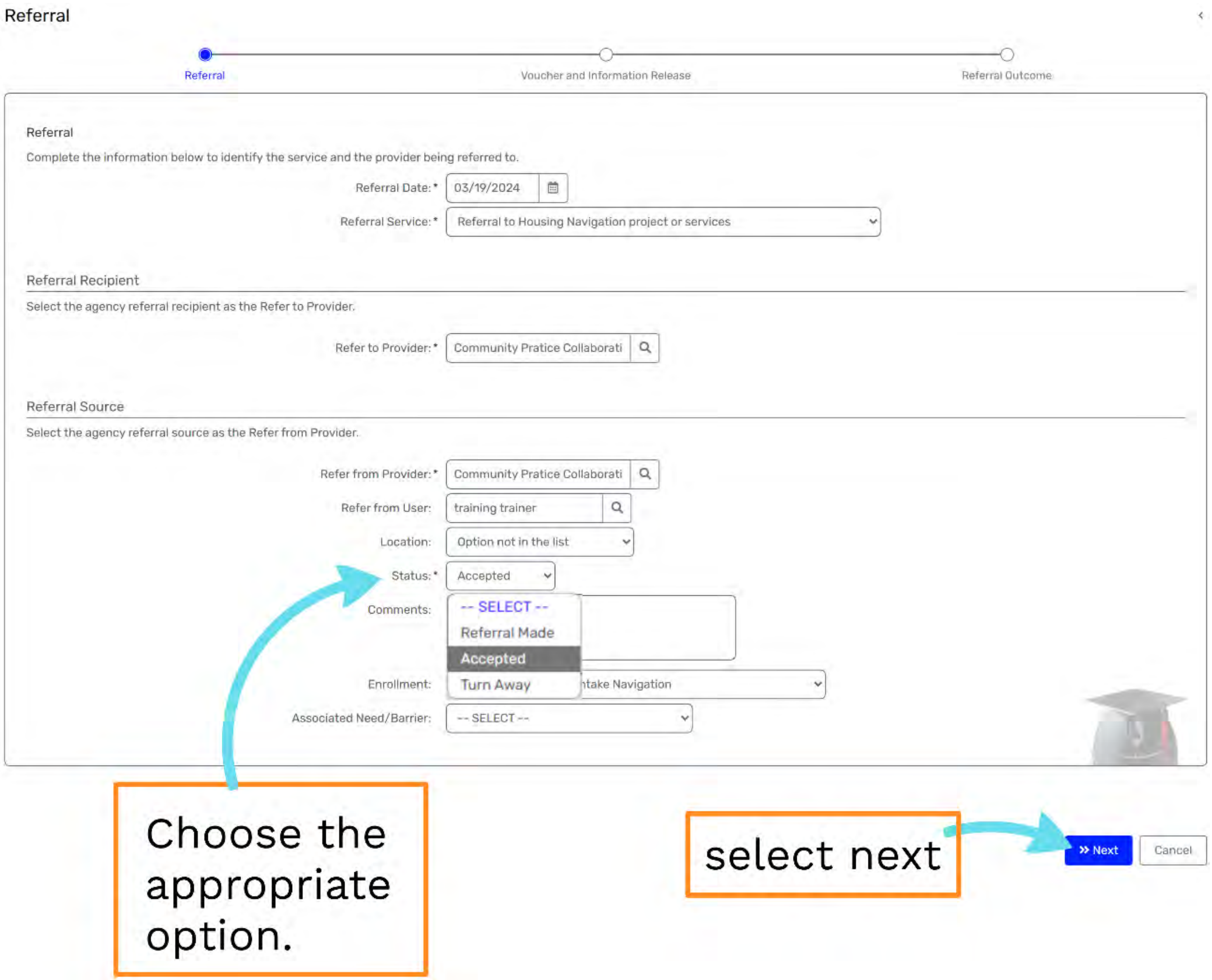
16 results found.

	Service	Referral Date	To Provider	Status	Result
✎ ✓	Referral to RRH project resource opening	09/13/2024	Community Pratice Collaborative	Referral Made	Service Provided
✎ ✓	Referral to Housing Navigation project or services	05/13/2024	Community Pratice Collaborative	Referral Made	Service Provided
✎ ✓	Referral to Housing Navigation project or services	05/01/2024	Community Pratice Collaborative	Referral Made	Service Provided
✎ ✓	Referral to Housing Navigation project or services	03/19/2024	Community Pratice Collaborative	Accepted	Service Provided

Select "edit"

Figure 4-102 – Recording Accepted Referrals - Edit Referral

Step 4: Under Referral Source, select “Accepted” as the status, fill any additional information. Required elements are marked with a (*). Click “Next” to proceed to the next page or click “Cancel” to exit without saving. ClientTrack will navigate to the “Voucher and Information Release” step in the “Referral” workspace container.



Referral

Referral — Voucher and Information Release — Referral Outcome

Referral

Complete the information below to identify the service and the provider being referred to.

Referral Date: * 03/19/2024

Referral Service: * Referral to Housing Navigation project or services

Referral Recipient

Select the agency referral recipient as the Refer to Provider.

Refer to Provider: * Community Pratice Collaborati

Referral Source

Select the agency referral source as the Refer from Provider.

Refer from Provider: * Community Pratice Collaborati

Refer from User: training trainer

Location: Option not in the list

Status: * Accepted

Comments:

Enrollment: ntake Navigation

Associated Need/Barrier: -- SELECT --

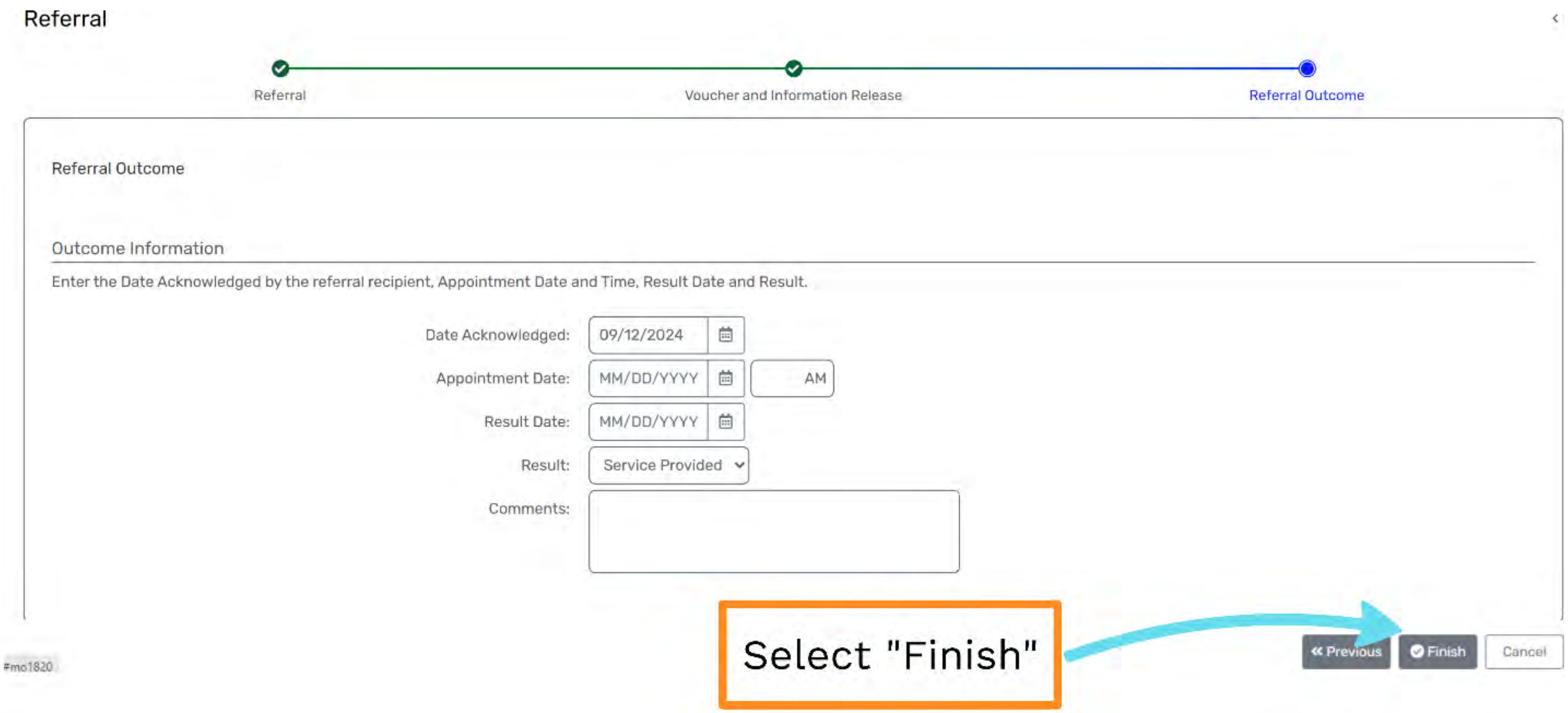
Choose the appropriate option.

select next

Figure 4-103 – Recording Accepted Referrals - Referral Status Accepted

Step 5: Fill out any additional information if applicable. Select the "Previous" button to make changes on previous pages if applicable. Click "Next" to proceed to the next page or click "Cancel" to exit without saving. ClientTrack will navigate to the "Referral Outcome" step in the "Referral" workspace container.

Step 6: Select the "Previous" button to make changes on previous pages if applicable. Click "Finish" if the information is correct or click "Cancel" to exit without saving. ClientTrack will navigate to the "Client Referrals" workspace container.



Referral

Referral Outcome

Outcome Information

Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged: 09/12/2024

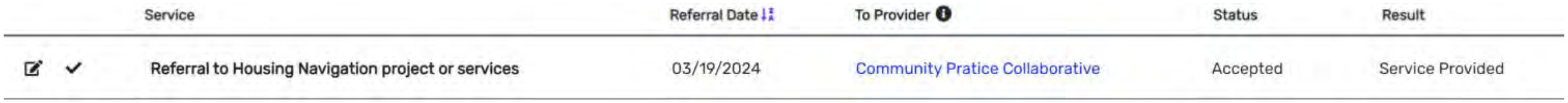
Appointment Date: MM/DD/YYYY AM

Result Date: MM/DD/YYYY

Result: Service Provided

Comments:

Figure 4-104 – Recording Accepted Referrals - Finish



	Service	Referral Date	To Provider	Status	Result
✎ ✓	Referral to Housing Navigation project or services	03/19/2024	Community Pratice Collaborative	Accepted	Service Provided

Figure 4-105 – Recording Accepted Referrals - Accepted Referral

Housing Program Eligibility and Availability: Subfolder

The Housing Program Eligibility and Availability: Subfolder is not used in ClientTrack as of the publishing of this manual.

Services: Folder

A service is a task performed for or on behalf of a client or a tangible item provided to a client. Each service has a name, a unit of measure (dollars, hours or minutes, count), a value, and an associated date. Services can be grouped together in a service group. Services are associated with grants which means that by selecting a grant when adding a service, only services "allowed" by that grant will populate in the dropdown menu.

Steps to Navigate to the "Services" Folder

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".***

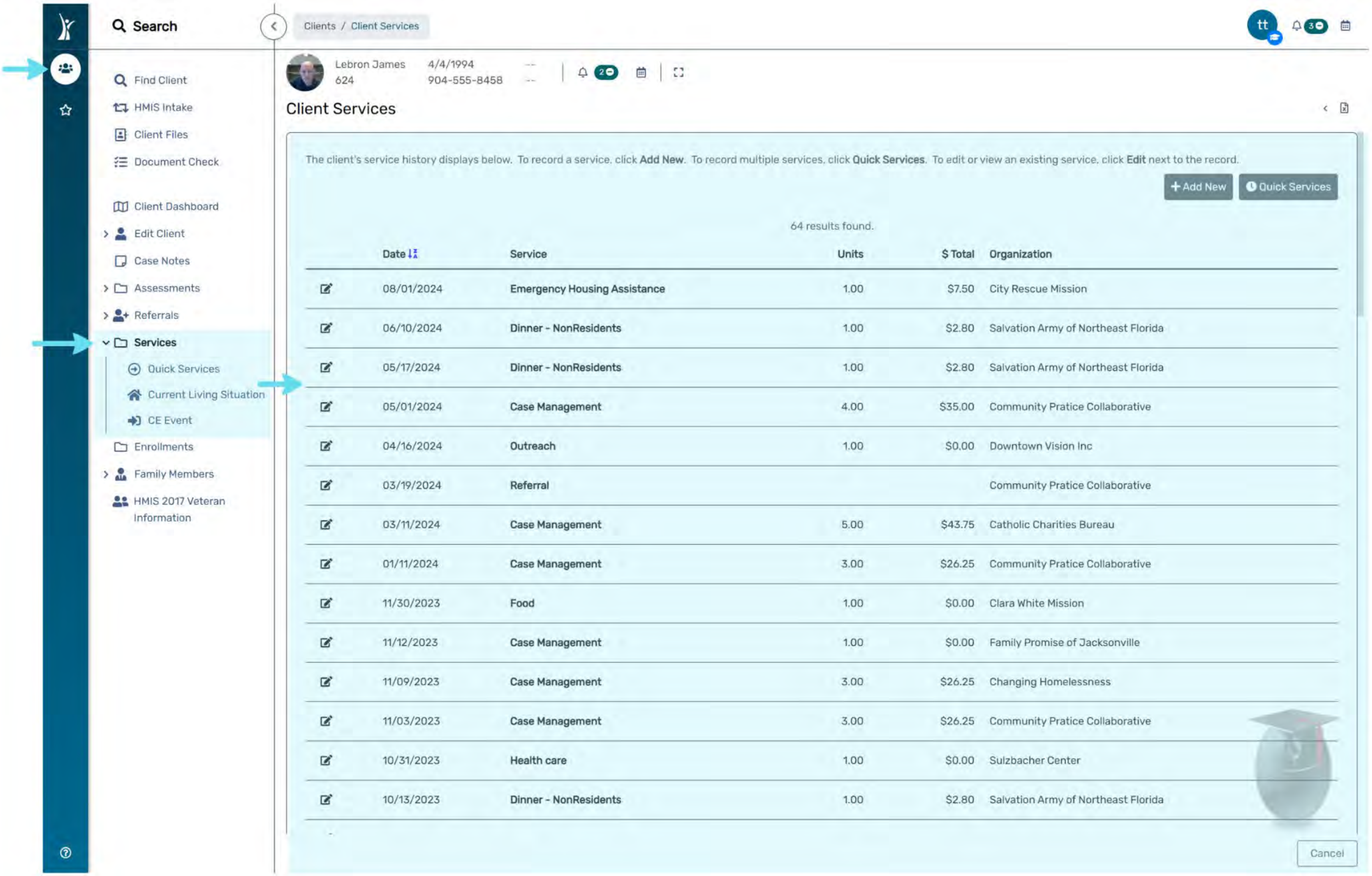
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".*

*** 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 “Services” secondary sidebar* menu option. ClientTrack will navigate to the “Client Services” workspace container, and a dropdown menu will appear under the “Services” folder.

** 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”.*



Client Services

The client's service history displays below. To record a service, click **Add New**. To record multiple services, click **Quick Services**. To edit or view an existing service, click **Edit** next to the record.

64 results found.

Date	Service	Units	$ Total	Organization
08/01/2024	Emergency Housing Assistance	1.00	$7.50	City Rescue Mission
06/10/2024	Dinner - NonResidents	1.00	$2.80	Salvation Army of Northeast Florida
05/17/2024	Dinner - NonResidents	1.00	$2.80	Salvation Army of Northeast Florida
05/01/2024	Case Management	4.00	$35.00	Community Pratice Collaborative
04/16/2024	Outreach	1.00	$0.00	Downtown Vision Inc
03/19/2024	Referral			Community Pratice Collaborative
03/11/2024	Case Management	5.00	$43.75	Catholic Charities Bureau
01/11/2024	Case Management	3.00	$26.25	Community Pratice Collaborative
11/30/2023	Food	1.00	$0.00	Clara White Mission
11/12/2023	Case Management	1.00	$0.00	Family Promise of Jacksonville
11/09/2023	Case Management	3.00	$26.25	Changing Homelessness
11/03/2023	Case Management	3.00	$26.25	Community Pratice Collaborative
10/31/2023	Health care	1.00	$0.00	Sulzbacher Center
10/13/2023	Dinner - NonResidents	1.00	$2.80	Salvation Army of Northeast Florida

Figure 4-106 – Navigating to the "Services" Folder

Viewing and Editing Services through the “Services” folder

Steps to Edit or View Services via the “Services” Folder

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”.*

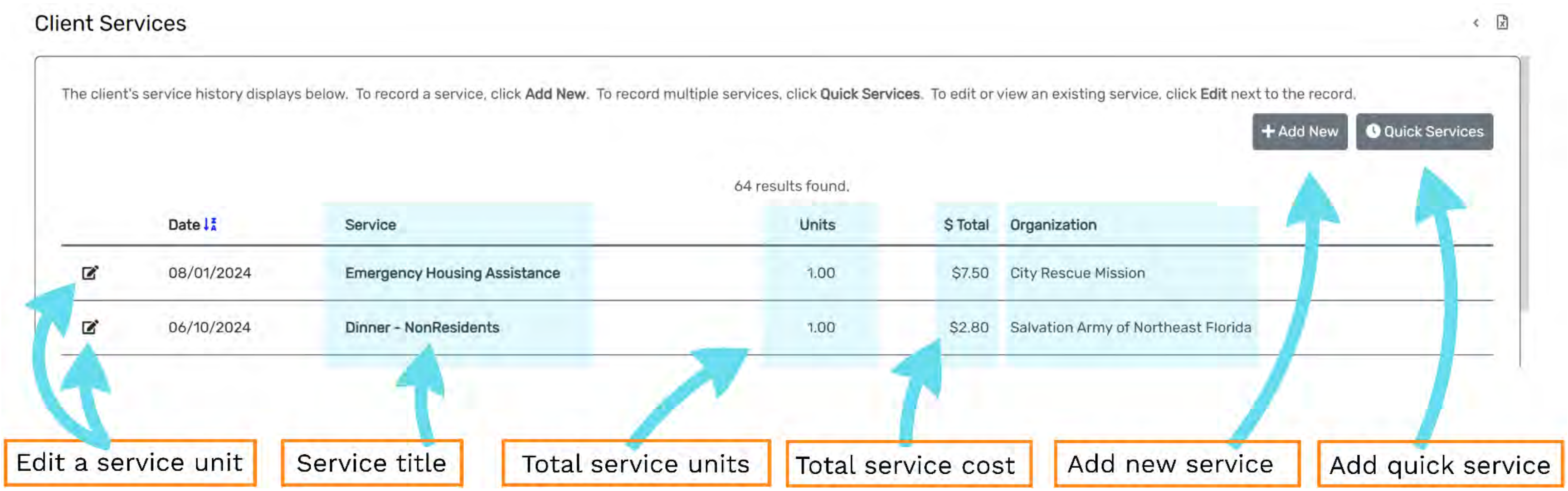
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Services” secondary sidebar menu option. ClientTrack will navigate to the “Client Services” workspace container*, and a dropdown menu will appear under the “Services” folder.

** 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”.*

Step 3: Select the edit icon* next to the appropriate service entry to view or edit. ClientTrack will navigate to the “Service” 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”.*


Client Services

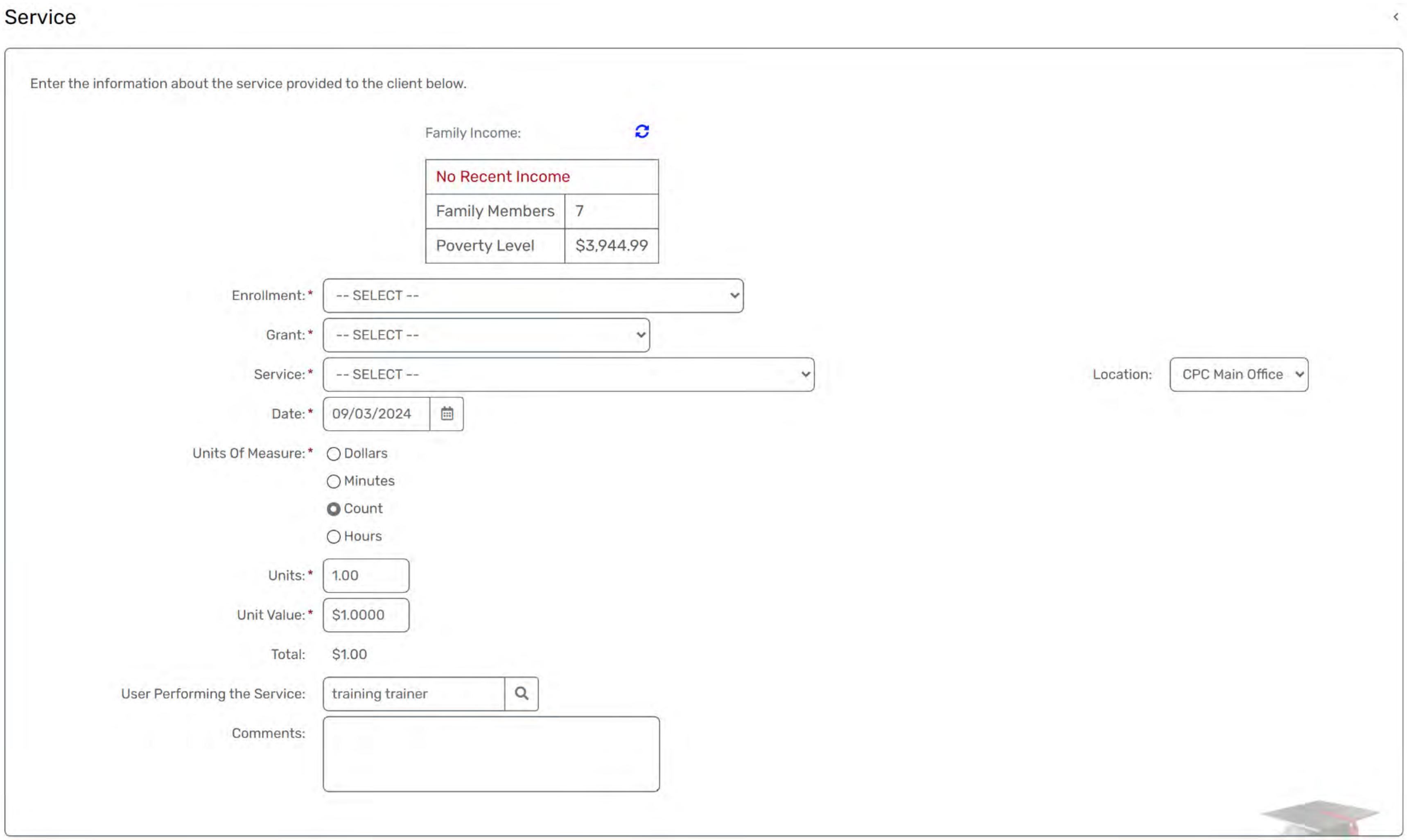
The client's service history displays below. To record a service, click **Add New**. To record multiple services, click **Quick Services**. To edit or view an existing service, click **Edit** next to the record.

64 results found.

	Date	Service	Units	$ Total	Organization
✎	08/01/2024	Emergency Housing Assistance	1.00	$7.50	City Rescue Mission
✎	06/10/2024	Dinner - NonResidents	1.00	$2.80	Salvation Army of Northeast Florida

Figure 4-107 – Client Services Page Anatomy

Step 4: View or edit entries as applicable. Required elements are marked with a (*). Click “Cancel” to exit without saving. Click “Save” to save changes. ClientTrack will navigate to the “Client Services” workspace container.



Service

Enter the information about the service provided to the client below.

Family Income:

No Recent Income	
Family Members	7
Poverty Level	$3,944.99

Enrollment: * -- SELECT --

Grant: * -- SELECT --

Service: * -- SELECT --

Location: CPC Main Office

Date: * 09/03/2024

Units Of Measure: *
○ Dollars
○ Minutes
● Count
○ Hours

Units: * 1.00

Unit Value: * $1.0000

Total: $1.00

User Performing the Service: training trainer

Comments:

Figure 4-108 – Client Services "Service" Form

Adding Services through the “Services” folder

Steps to Add Services via the “Services” Folder

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”.*

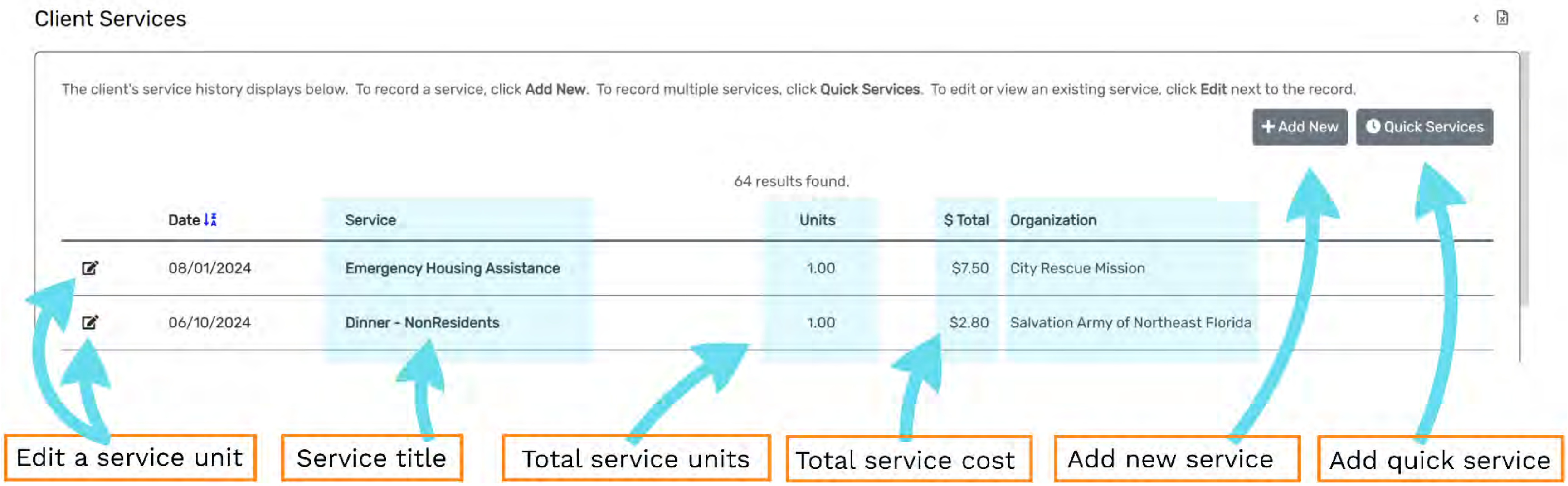
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** 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 “Services” secondary sidebar menu option. ClientTrack will navigate to the “Client Services” workspace container*, and a dropdown menu will appear under the “Services” folder.

** 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”.*

Step 3: Select the “Add New” button at the top right section of the “Client Services” workspace container. ClientTrack will navigate to the “Service” workspace container.



Client Services

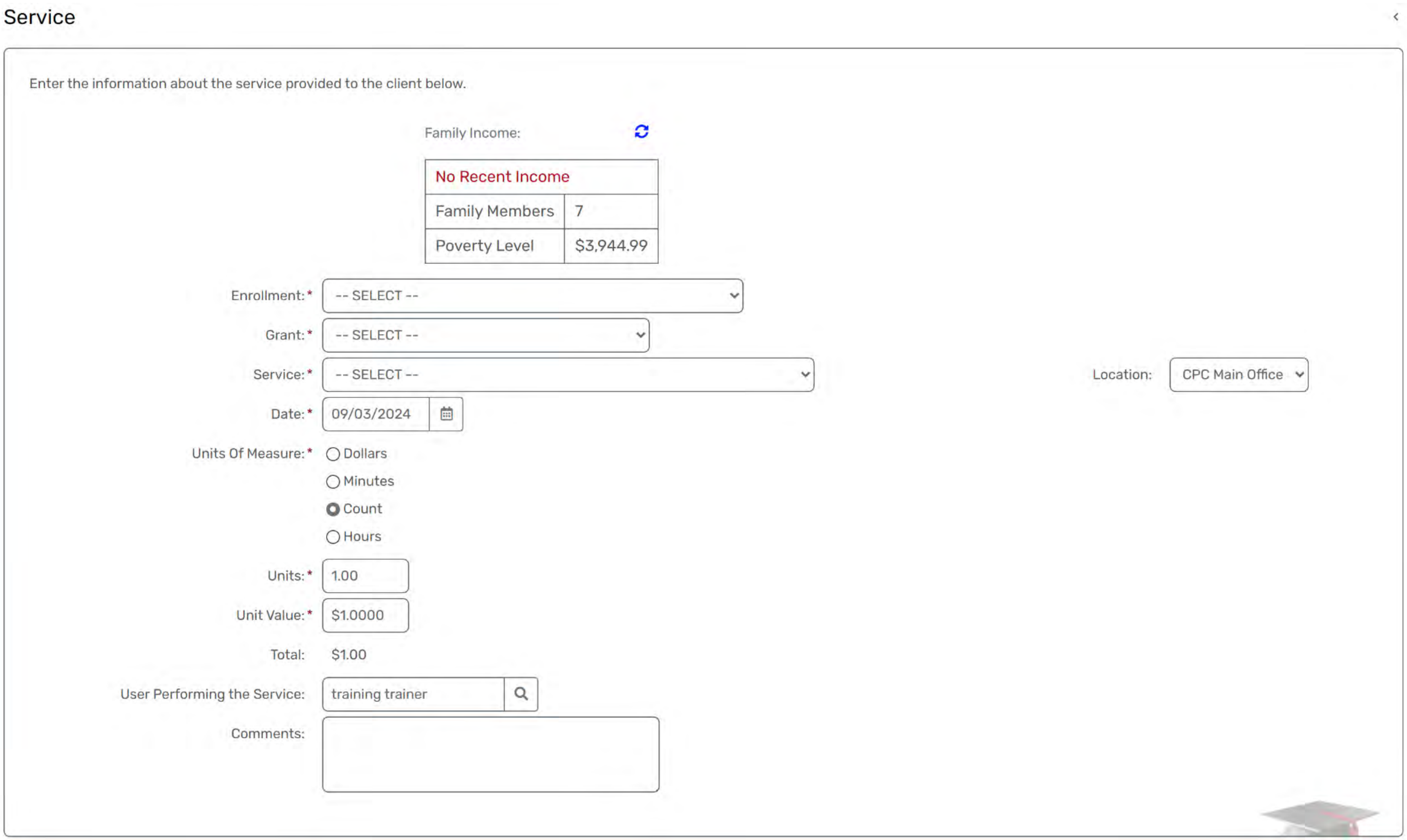
The client's service history displays below. To record a service, click **Add New**. To record multiple services, click **Quick Services**. To edit or view an existing service, click **Edit** next to the record.

64 results found.

	Date	Service	Units	$ Total	Organization
✎	08/01/2024	Emergency Housing Assistance	1.00	$7.50	City Rescue Mission
✎	06/10/2024	Dinner - NonResidents	1.00	$2.80	Salvation Army of Northeast Florida

Figure 4-109 - Client Services Page Anatomy

Step 4 - The *Service form* will ask to enter information about the service being provided to this client. Please refer to your organization’s program guide and/or speak with your supervisor regarding how to best record service units for a client’s specific program. Required elements are marked with a (*).



Service

Enter the information about the service provided to the client below.

Family Income:

No Recent Income	
Family Members	7
Poverty Level	$3,944.99

Enrollment: * -- SELECT --

Grant: * -- SELECT --

Service: * -- SELECT --

Location: CPC Main Office

Date: * 09/03/2024

Units Of Measure: *
○ Dollars
○ Minutes
● Count
○ Hours

Units: * 1.00

Unit Value: * $1.0000

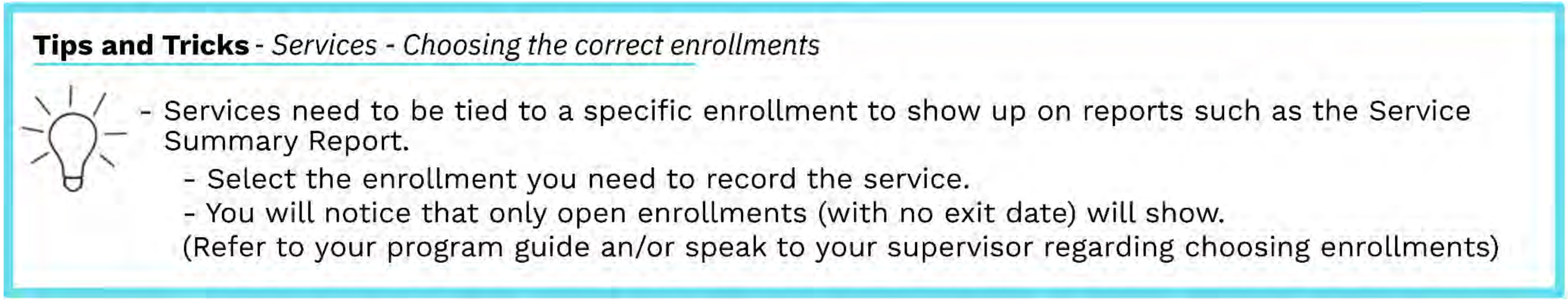
Total: $1.00

User Performing the Service: training trainer

Comments:

Figure 4-110 - Client Services "Service" Form

Step 5: Select the "Enrollment" from the enrollment field dropdown menu.



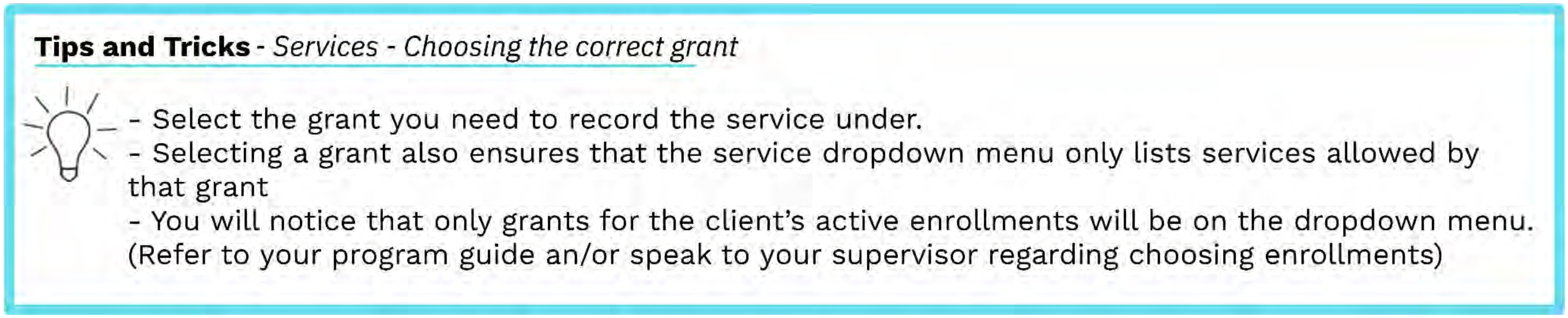
Tips and Tricks - *Services - Choosing the correct enrollments*

- Services need to be tied to a specific enrollment to show up on reports such as the Service Summary Report.
  - Select the enrollment you need to record the service.
  - You will notice that only open enrollments (with no exit date) will show.

(Refer to your program guide an/or speak to your supervisor regarding choosing enrollments)

Figure 4-111 – Tips and Tricks – Choosing Correct Enrollments in Services

Step 6: Select the "Grant" from the grant field dropdown menu. The Grant field is used to link the service to the grant for APR purposes.



Tips and Tricks - *Services - Choosing the correct grant*

- Select the grant you need to record the service under.
- Selecting a grant also ensures that the service dropdown menu only lists services allowed by that grant
- You will notice that only grants for the client's active enrollments will be on the dropdown menu.

(Refer to your program guide an/or speak to your supervisor regarding choosing enrollments)

Figure 4-112 – Tips and Tricks – Choosing Correct Grants in Services

Step 7: Select the "Service" from the service field dropdown menu.

Step 8: Verify the "Date" field is correct. Services may be backdated by changing the date here, however, the service must occur on or after the enrollment date to tie properly for reporting.

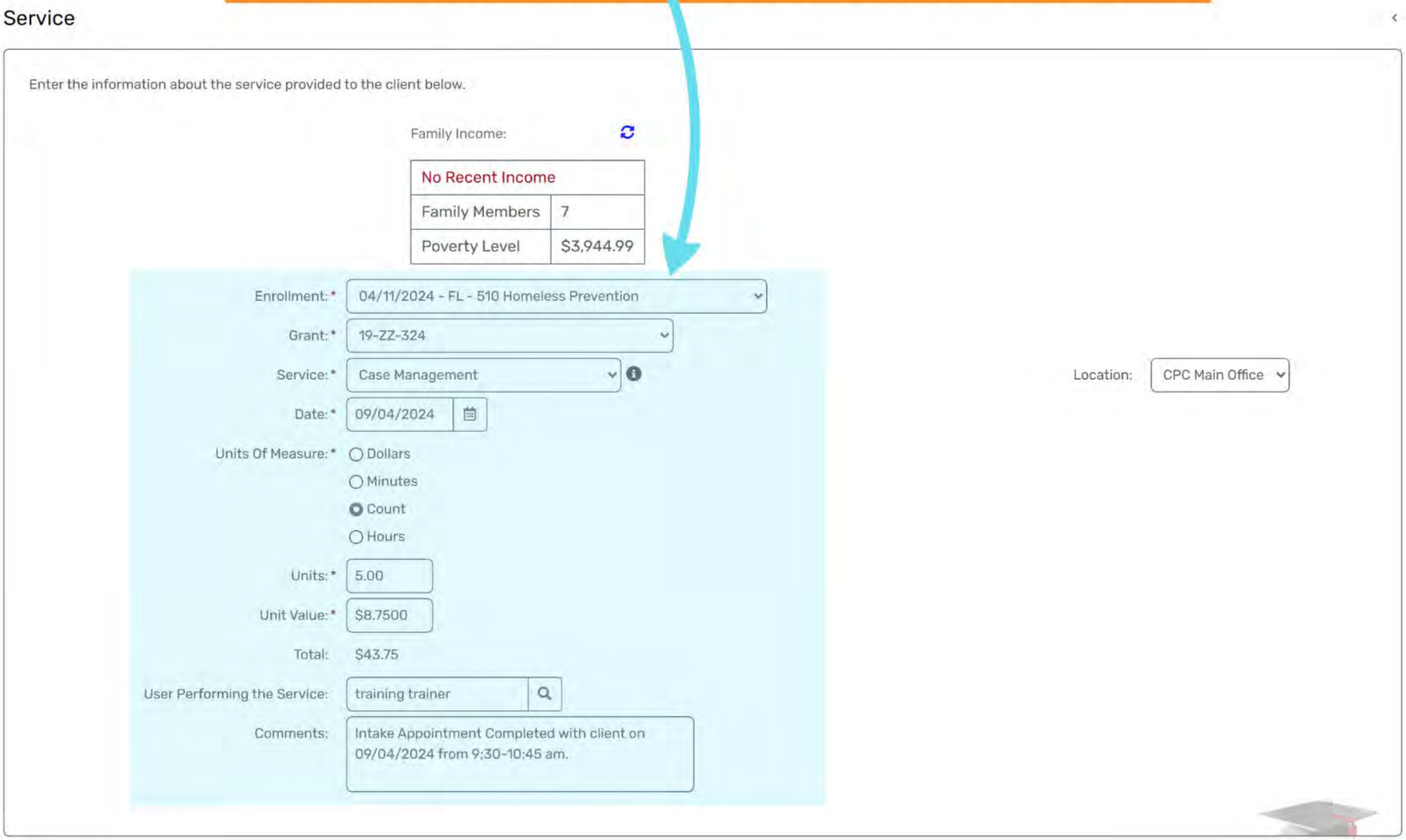
Step 9: Verify the "Units of Measure" and enter the number of "Units" into the unit field.

Step 10: Type a brief/descriptive comment in the "Comment" box*. This is especially necessary if providing a monthly service that should not be duplicated (ex. Rental assistance). Adding keywords will clarify any ambiguity around the details of the service.

** Each Service entered should have a Case Note* entered for that day as well that provides further documentation/details about the Service provided.*

** For instructions on managing and entering Case Notes, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Case Notes: Folder in the "HMIS Basic User 2025 Manual".*

An example of a completed service unit form



Service

Enter the information about the service provided to the client below.

Family Income:

No Recent Income	
Family Members	7
Poverty Level	$3,944.99

Enrollment:* 04/11/2024 - FL - 510 Homeless Prevention

Grant:* 19-ZZ-324

Service:* Case Management

Location: CPC Main Office

Date:* 09/04/2024

Units Of Measure:*
○ Dollars
○ Minutes
● Count
○ Hours

Units:* 5.00

Unit Value:* $8.7500

Total: $43.75

User Performing the Service: training trainer

Comments: Intake Appointment Completed with client on 09/04/2024 from 9:30-10:45 am.

Figure 4-113 – Example of a Completed Service Unit Form

Step 10: Click “Save” to save changes or click “Cancel” to exit without saving. ClientTrack will navigate to the “Client Services” workspace container. The service entered is viewable from the “Client Services” workspace container.

Quick Services

Quick Services is a feature designed to help specific programs that need to record a high rate of services in a short timeframe. For more information regarding quick services, contact hmis@changinghomelessness.org

Current Living Situation: Subfolder

Coordinated Entry and ESG outreach recipients are required to record a current living situation each time contact is made with a client.

Steps to Add a New Current Living Situation

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”.*

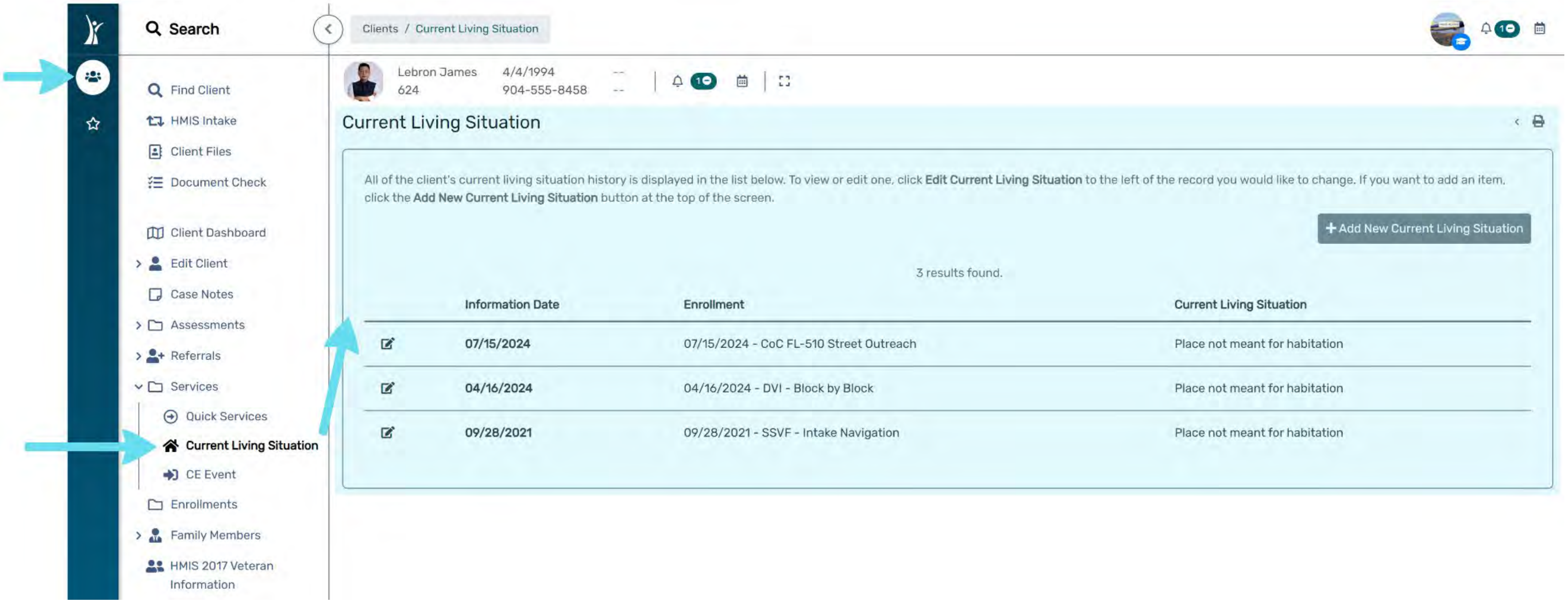
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** 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 "Services" secondary sidebar* menu option. ClientTrack will navigate to the "Client Services" workspace container, and a dropdown menu will appear under the "Services" folder.

** 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".*

Step 3: Select the "Current Living Situation" secondary sidebar dropdown menu option. ClientTrack will navigate to the "Current Living Situation" workspace container.



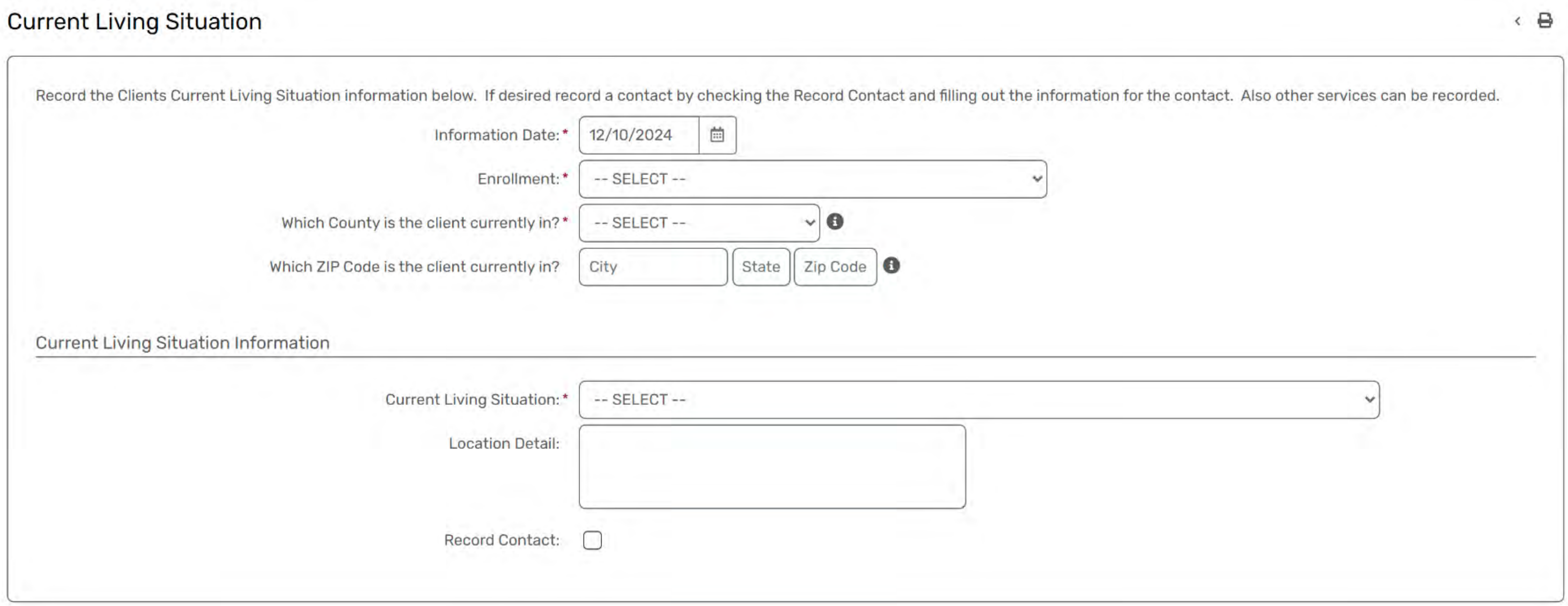
All of the client's current living situation history is displayed in the list below. To view or edit one, click **Edit Current Living Situation** to the left of the record you would like to change. If you want to add an item, click the **Add New Current Living Situation** button at the top of the screen.

3 results found.

Information Date	Enrollment	Current Living Situation
07/15/2024	07/15/2024 - CoC FL-510 Street Outreach	Place not meant for habitation
04/16/2024	04/16/2024 - DVI - Block by Block	Place not meant for habitation
09/28/2021	09/28/2021 - SSVF - Intake Navigation	Place not meant for habitation

Figure 4-114 – Coordinated Entry – Current Living Situation

Step 4: Click the “Add New Current Living Situation” button on the top right part of the Current Living Situation workspace container. ClientTrack will navigate to the “Current Living Situation” workspace container.   ClientTrack will navigate to the Current Living Situation form.



Current Living Situation

Record the Clients Current Living Situation information below. If desired record a contact by checking the Record Contact and filling out the information for the contact. Also other services can be recorded.

Information Date:* 12/10/2024

Enrollment:* -- SELECT --

Which County is the client currently in?* -- SELECT --

Which ZIP Code is the client currently in? City State Zip Code

Current Living Situation Information

Current Living Situation:* -- SELECT --

Location Detail:

Record Contact: ☐

Figure 4-115 – Coordinated Entry – Current Living Situation Form

Step 4: Fill out the Current Living Situation form as applicable. Required elements are marked with a (*).

Step 5: Click “Save” to save changes or click “Cancel” to exit without saving. ClientTrack will navigate to the “Current Living Situation” workspace container.

CE Event: Subfolder

This section is for Coordinated Entry staff. For referrals for and from all other users, see *Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder*

CE Event in ClientTrack allows Coordinated Entry users to refer and track referrals for clients to applicable agencies/organizations. All referrals from Coordinated Entry will be recorded in ClientTrack through the CE Event CE Event Referrals include recording new CE Events*, accepting referrals**, and updating CE Events***.

** For instructions on recording new CE Events, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/CE Event/Recording New CE Event in the “HMIS Basic User 2025 Manual”.*

*** For instructions on accepting referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/Referrals - Service Provider – Accepting Referrals in the “HMIS Basic User 2025 Manual”.*

**** For instructions on updating new CE events, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/CE Events/Updating New CE Events in the “HMIS Basic User 2025 Manual”.*

Steps to Navigate to the CE Event Subfolder

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”.*

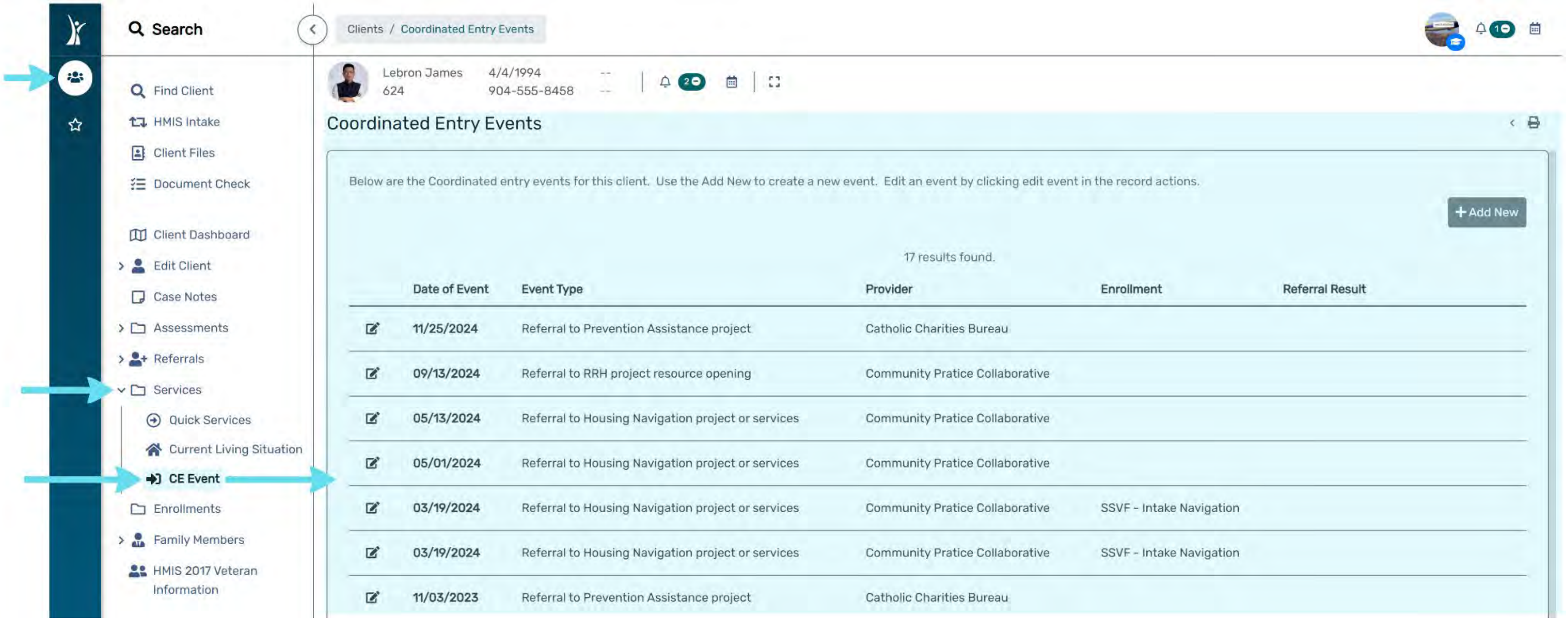
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** 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 “Services” secondary sidebar* menu option. ClientTrack will navigate to the “Client Services” workspace container, and a dropdown menu will appear under the “Services” folder.

** 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”.*

Step 3: Select the “CE Event” secondary sidebar dropdown menu option. ClientTrack will navigate to the “Coordinated Entry Events” workspace container.



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

Coordinated Entry Events

Below are the Coordinated entry events for this client. Use the Add New to create a new event. Edit an event by clicking edit event in the record actions.

17 results found.

	Date of Event	Event Type	Provider	Enrollment	Referral Result
✎	11/25/2024	Referral to Prevention Assistance project	Catholic Charities Bureau		
✎	09/13/2024	Referral to RRH project resource opening	Community Pratice Collaborative		
✎	05/13/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative		
✎	05/01/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative		
✎	03/19/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative	SSVF - Intake Navigation	
✎	03/19/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative	SSVF - Intake Navigation	
✎	11/03/2023	Referral to Prevention Assistance project	Catholic Charities Bureau		

Figure 4-116 – Coordinated Entry (CE) Events

Recording New CE Event

This section is section 1 of 2 regarding CE (Coordinated Entry) Events*, Recording New CE Events, and Updating New CE Events**.

** This section is for Coordinated Entry staff. For referrals for and from all other users, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder in the "HMIS Basic User 2025 Manual".*

*** For instructions on updating new CE events, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/CE Events/Updating New CE Events in the "HMIS Basic User 2025 Manual".*

Steps to Recording New CE Events via the CE Event Subfolder

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".*

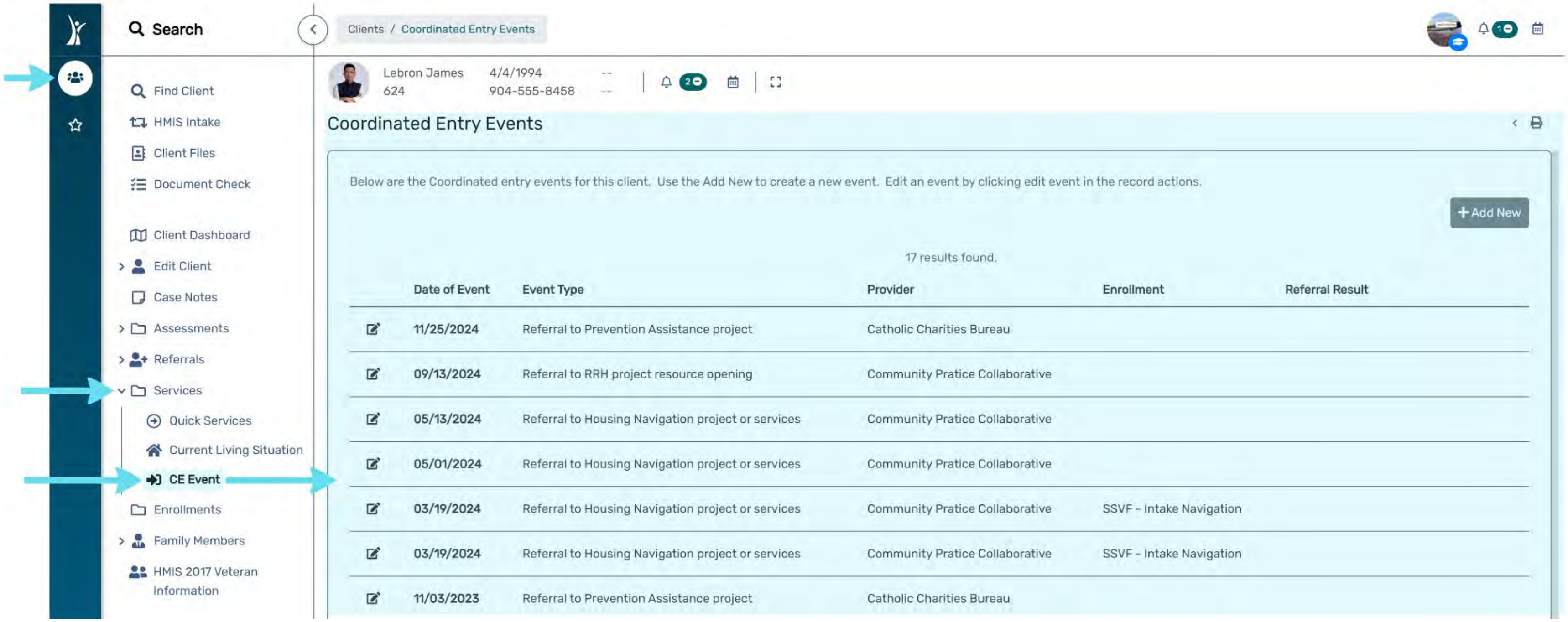
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".*

**** 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 "Services" secondary sidebar* menu option. ClientTrack will navigate to the "Client Services" workspace container, and a dropdown menu will appear under the "Services" folder.

** 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".*

Step 3: Select the “CE Event” secondary sidebar dropdown menu option. ClientTrack will navigate to the “Coordinated Entry Events” workspace container.



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

Coordinated Entry Events

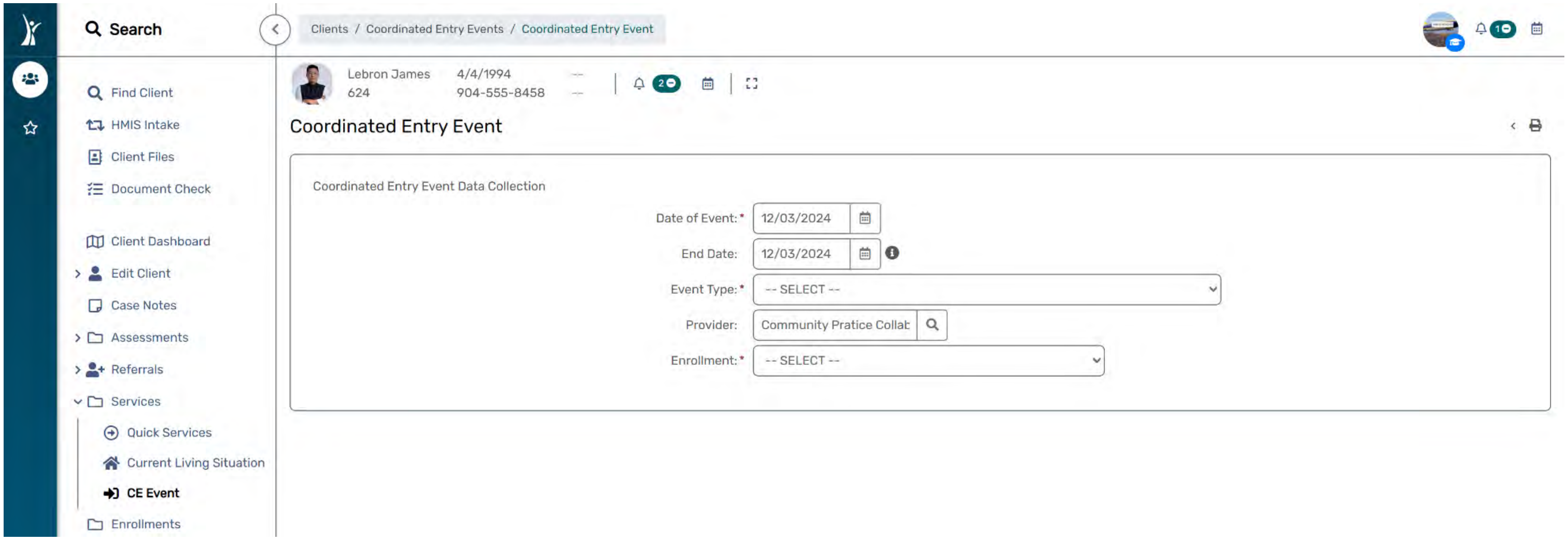
Below are the Coordinated entry events for this client. Use the Add New to create a new event. Edit an event by clicking edit event in the record actions.

17 results found.

Date of Event	Event Type	Provider	Enrollment	Referral Result
11/25/2024	Referral to Prevention Assistance project	Catholic Charities Bureau		
09/13/2024	Referral to RRH project resource opening	Community Pratice Collaborative		
05/13/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative		
05/01/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative		
03/19/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative	SSVF - Intake Navigation	
03/19/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative	SSVF - Intake Navigation	
11/03/2023	Referral to Prevention Assistance project	Catholic Charities Bureau		

Figure 4-117 – Coordinated Entry (CE) Events

Step 4: Click, “Add New” at the top right in the referral container space. ClientTrack will navigate to the “Coordinated Entry Events” workspace container.



Coordinated Entry Event

Coordinated Entry Event Data Collection

Date of Event:* 12/03/2024

End Date: 12/03/2024

Event Type:* -- SELECT --

Provider: Community Pratice Collab

Enrollment:* -- SELECT --

Figure 4-118 – Coordinated Entry Event Form

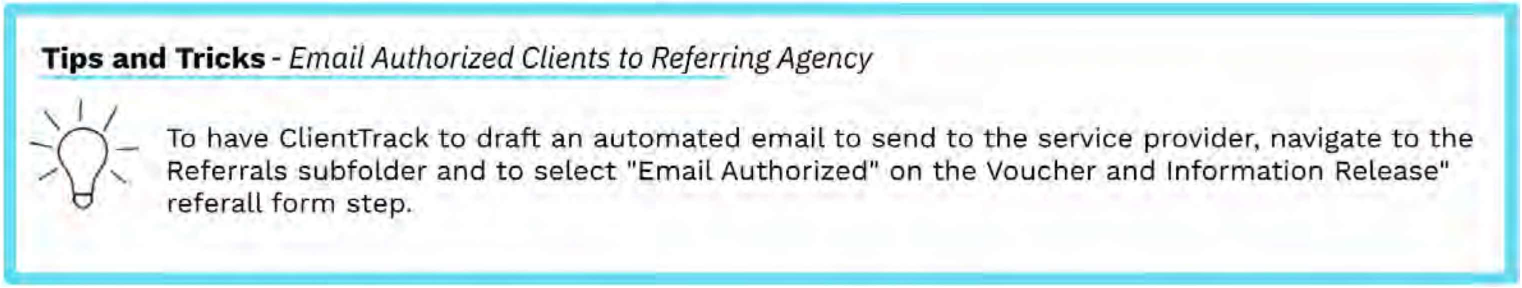
Step 5: Fill out the Coordinated Entry Event Data Collection form as applicable*. Required elements are marked with a (*).

** If a housing project** is selected as the "Event Type", the Coordinated Entry Event Data Collection form will populate a "Referral Result" and "Result Date". Referral Result and Result dates will be recorded when updating CE Events***.*

***Housing Project examples include Emergency Shelters (ES), Rapid Rehousing projects (RRH), Permanent Housing (PH), Permanent Supportive Housing (PSH), and Housing Stability Vouchers.*

**** For instructions on updating new CE events, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/CE Events/Updating New CE Events in the "HMIS Basic User 2025 Manual".*

Step 6: Click the "Save" button. ClientTrack will navigate to the Coordinated Entry Events workspace container. The created CE event will be visible in the "Coordinated Entry Events" workspace container. An identical non-duplicated referral will be visible in the "Client Referrals"* workspace container.

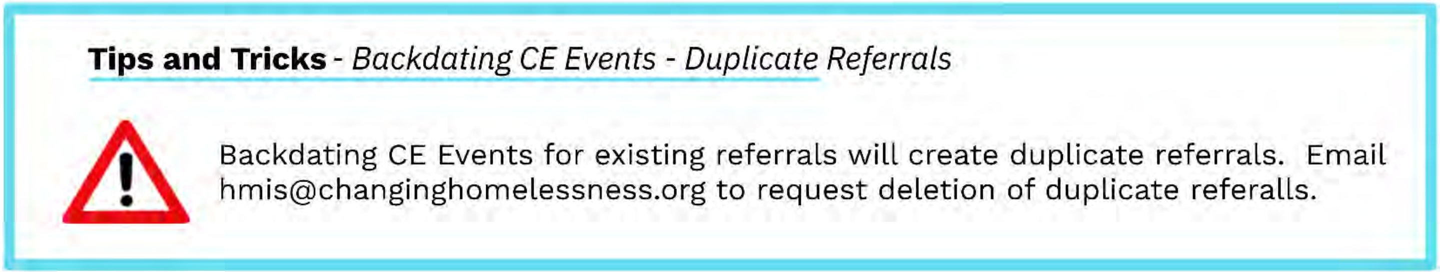


Tips and Tricks - *Email Authorized Clients to Referring Agency*

To have ClientTrack to draft an automated email to send to the service provider, navigate to the Referrals subfolder and to select "Email Authorized" on the Voucher and Information Release" referall form step.

Figure 4-119 – Tips and Tricks – CE Event – Email Authorized Client to Referring Agency

** For instructions on how service providers accept referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/Referrals - Service Provider – Accepting Referrals in the “HMIS Basic User 2025 Manual”.*



Tips and Tricks - *Backdating CE Events - Duplicate Referrals*

Backdating CE Events for existing referrals will create duplicate referrals. Email hmis@changinghomelessness.org to request deletion of duplicate referalls.

Figure 4-120 – Tips and Tricks – Backdating CE Events – Preventing Duplicate Referrals

Updating New CE Events

This section is section 2 of 2 regarding CE (Coordinated Entry) Events*, Recording New CE Events**, and Updating New CE Events.

** This section is for Coordinated Entry staff. For referrals for and from all other users, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder in the "HMIS Basic User 2025 Manual".*

*** For instructions on recording new CE events, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/CE Events/Recording New CE Event in the "HMIS Basic User 2025 Manual".*

Steps to Recording Accepted Referrals via the Referrals Folder

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".*

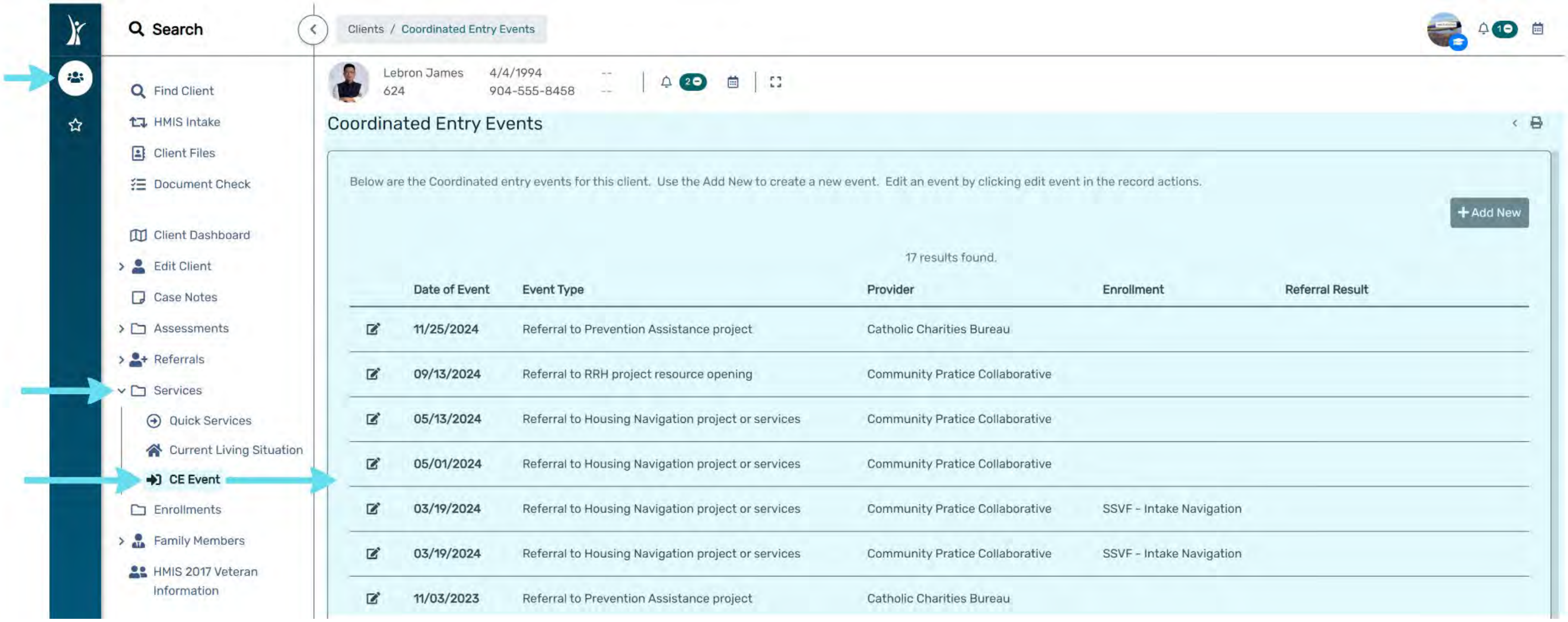
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".*

**** 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 "Services" secondary sidebar* menu option. ClientTrack will navigate to the "Client Services" workspace container, and a dropdown menu will appear under the "Services" folder.

**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".*

Step 3: Select the "CE Event" secondary sidebar dropdown menu option. ClientTrack will navigate to the "Coordinated Entry Events" workspace container.



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

Coordinated Entry Events

Below are the Coordinated entry events for this client. Use the Add New to create a new event. Edit an event by clicking edit event in the record actions.

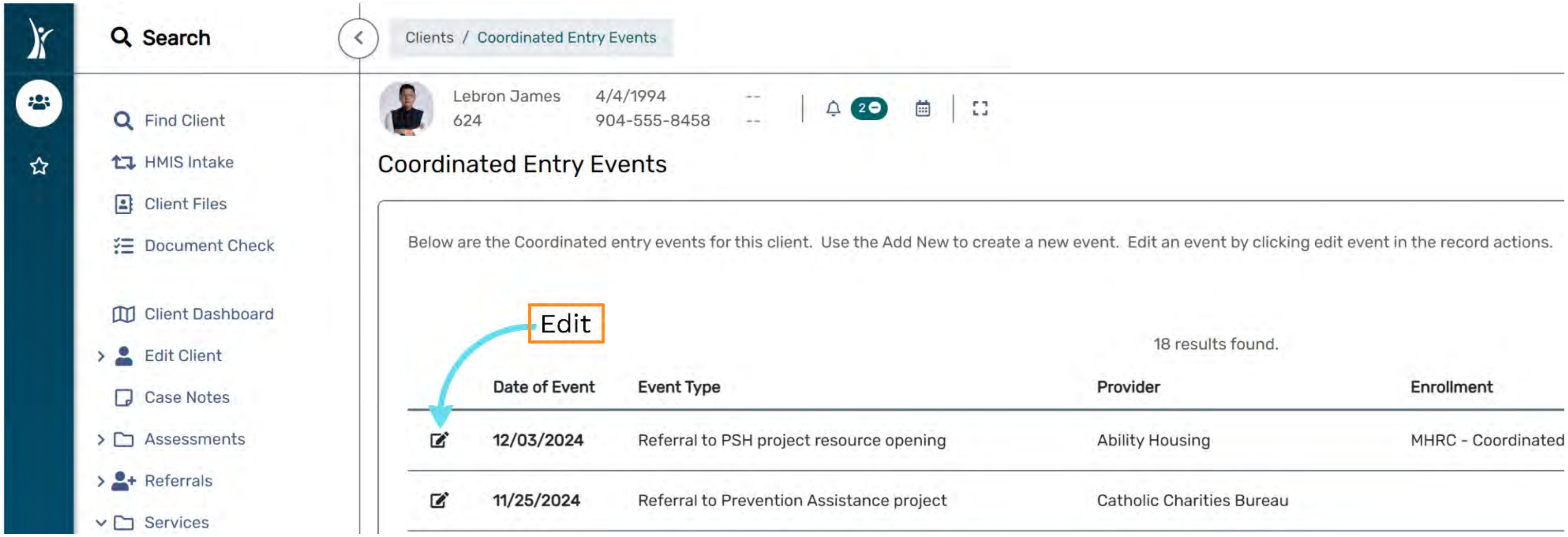
17 results found.

	Date of Event	Event Type	Provider	Enrollment	Referral Result
✎	11/25/2024	Referral to Prevention Assistance project	Catholic Charities Bureau		
✎	09/13/2024	Referral to RRH project resource opening	Community Pratice Collaborative		
✎	05/13/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative		
✎	05/01/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative		
✎	03/19/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative	SSVF - Intake Navigation	
✎	03/19/2024	Referral to Housing Navigation project or services	Community Pratice Collaborative	SSVF - Intake Navigation	
✎	11/03/2023	Referral to Prevention Assistance project	Catholic Charities Bureau		

Figure 4-121 – Coordinated Entry (CE) Events

Step 4: Click the edit icon next to the appropriate CE Event. ClientTrack will navigate to the “Coordinated Entry Event” 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”.*



Coordinated Entry Events

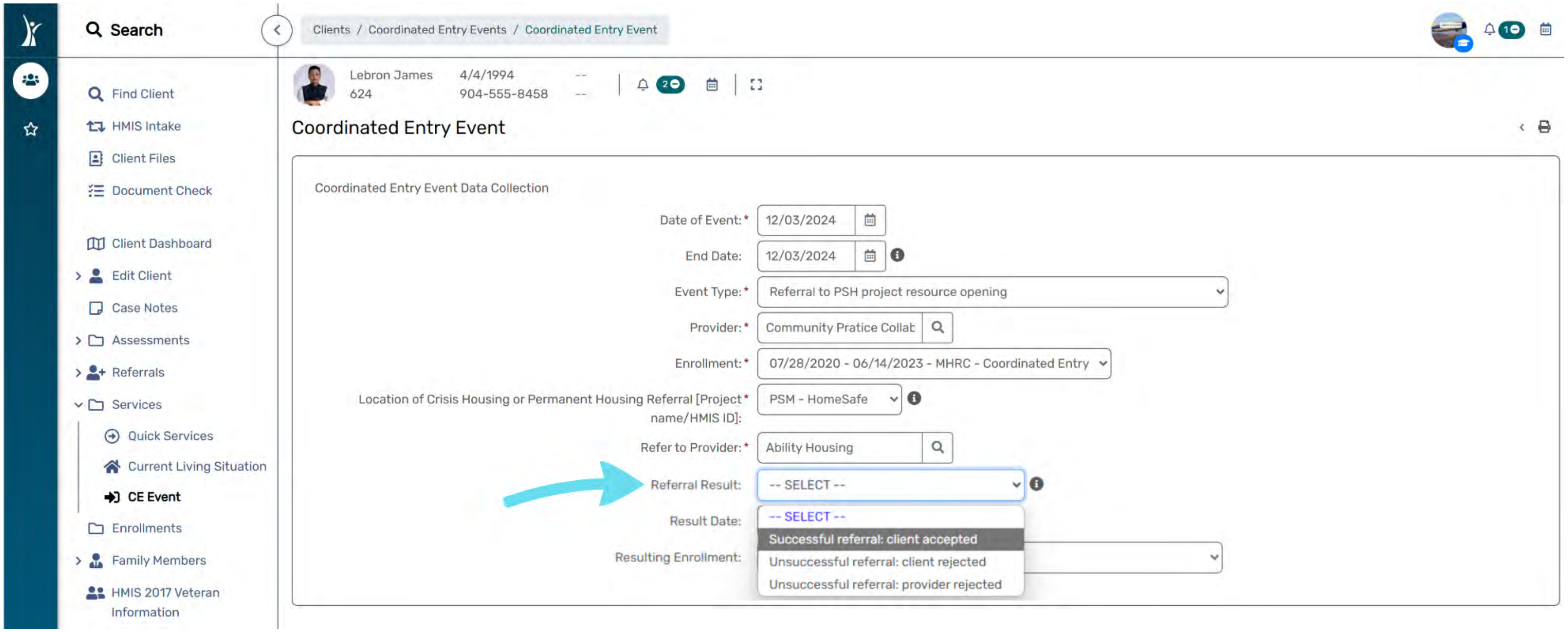
Below are the Coordinated entry events for this client. Use the Add New to create a new event. Edit an event by clicking edit event in the record actions.

18 results found.

	Date of Event	Event Type	Provider	Enrollment
	12/03/2024	Referral to PSH project resource opening	Ability Housing	MHRC - Coordinated
	11/25/2024	Referral to Prevention Assistance project	Catholic Charities Bureau	

Figure 4-122 – Editing/Updating Existing CE Events

Step 5: Under Referral Result, select "Successful referral: client accepted" as the status.



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

Coordinated Entry Event

Coordinated Entry Event Data Collection

Date of Event:* 12/03/2024

End Date: 12/03/2024

Event Type:* Referral to PSH project resource opening

Provider:* Community Pratice Collab

Enrollment:* 07/28/2020 - 06/14/2023 - MHRC - Coordinated Entry

Location of Crisis Housing or Permanent Housing Referral [Project name/HMIS ID]:* PSM - HomeSafe

Refer to Provider:* Ability Housing

Referral Result: -- SELECT --

Result Date:

Resulting Enrollment:

Figure 4-123 – Coordinated Entry Event – Selecting Referral Result

Step 6: Under “Result Date”, select the date the referral was accepted.

Step 7: Under “Resulting Enrollment”, select the appropriate enrollment if applicable.

Step 8: Click “Save” to save or click “Cancel” to exit without saving. ClientTrack will navigate to the “Coordinated Entry Events” in the “Referral” workspace container.

Enrollments: Folder

The “Enrollments” folder menu option provides a list of all previous and current program enrollments for a selected client. This “Enrollments” folder differs from the enrollments section on the “Client Dashboard”* in that it displays a complete list of all current and past enrollments in a single workspace container.

** 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”*

Adding a new enrollment through the Enrollment Client Workspace container is the same as selecting the “Use the current client” option found in the “HMIS Intake”* secondary sidebar menu option.

** For instruction on how to start an enrollment through the “HMIS Intake” folder, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/HMIS Intake: Folder in the “HMIS Basic User 2025 Manual”.*

For information regarding editing existing enrollments, please reach out the hmis@changinghomelessness.org and/or navigate to Chapter 5 : Basics of Entering Data into ClientTrack/Editing an Existing Enrollment

Steps to Navigate to the “Enrollments” Folder

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”.***

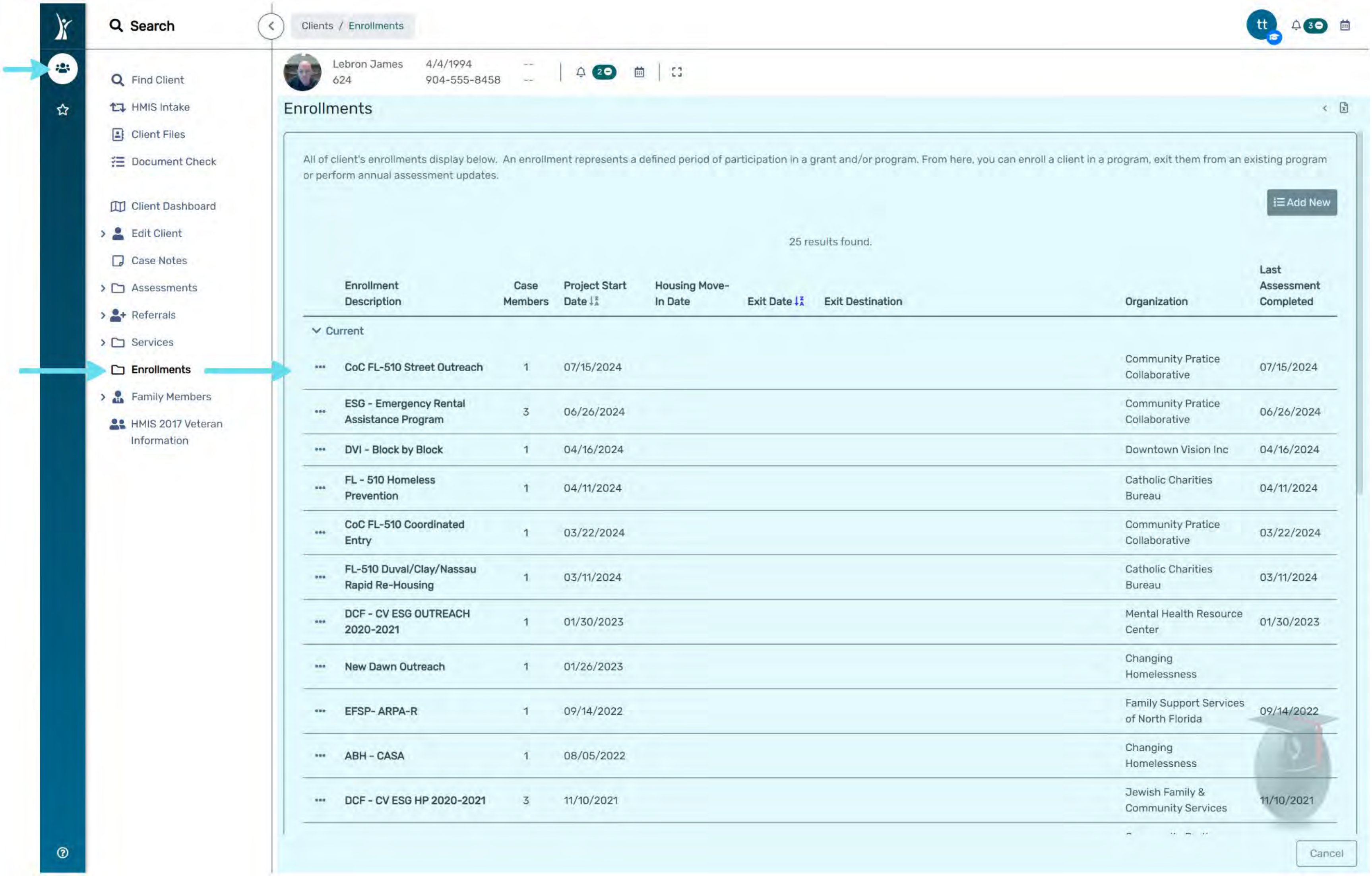
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*** 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”.*



Enrollments

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 existing program or perform annual assessment updates.

25 results found.

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	1	07/15/2024				Community Pratice Collaborative	07/15/2024
ESG - Emergency Rental Assistance Program	3	06/26/2024				Community Pratice 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 Pratice 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	
DCF - CV ESG HP 2020-2021	3	11/10/2021				Jewish Family & Community Services	11/10/2021

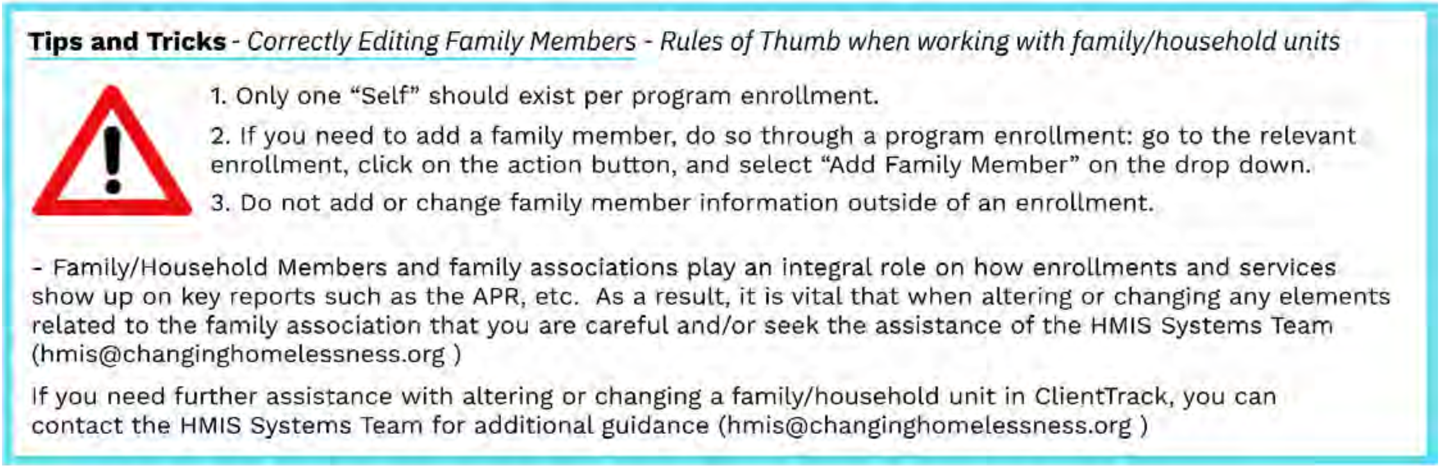
Figure 4-124 – Navigating to Enrollments Folder

Family Members: Folder

Any client(s) relationship to other clients within an enrollment are often entered in the ClientTrack database as families. ClientTrack uses the term “family” to refer to a household. HUD’s Data Manual* defines a household as, “[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."

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

A client may be a member of multiple households but always has a “primary household” identified. The “Family Members” menu option allows the Client’s family/household members to be managed.



Tips and Tricks - *Correctly Editing Family Members - Rules of Thumb when working with family/household units*

1. Only one “Self” should exist per program enrollment.
2. If you need to add a family member, do so through a program enrollment: go to the relevant enrollment, click on the action button, and select “Add Family Member” on the drop down.
3. Do not add or change family member information outside of an enrollment.

- Family/Household Members and family associations play an integral role on how enrollments and services show up on key reports such as the APR, etc. As a result, it is vital that when altering or changing any elements related to the family association that you are careful and/or seek the assistance of the HMIS Systems Team (hmis@changinghomelessness.org)

If you need further assistance with altering or changing a family/household unit in ClientTrack, you can contact the HMIS Systems Team for additional guidance (hmis@changinghomelessness.org)

Figure 4-125 – Tips and Tricks – Correctly Editing Family Members in Existing Enrollments

Steps to Navigate to the "Family Members" Folder

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".***

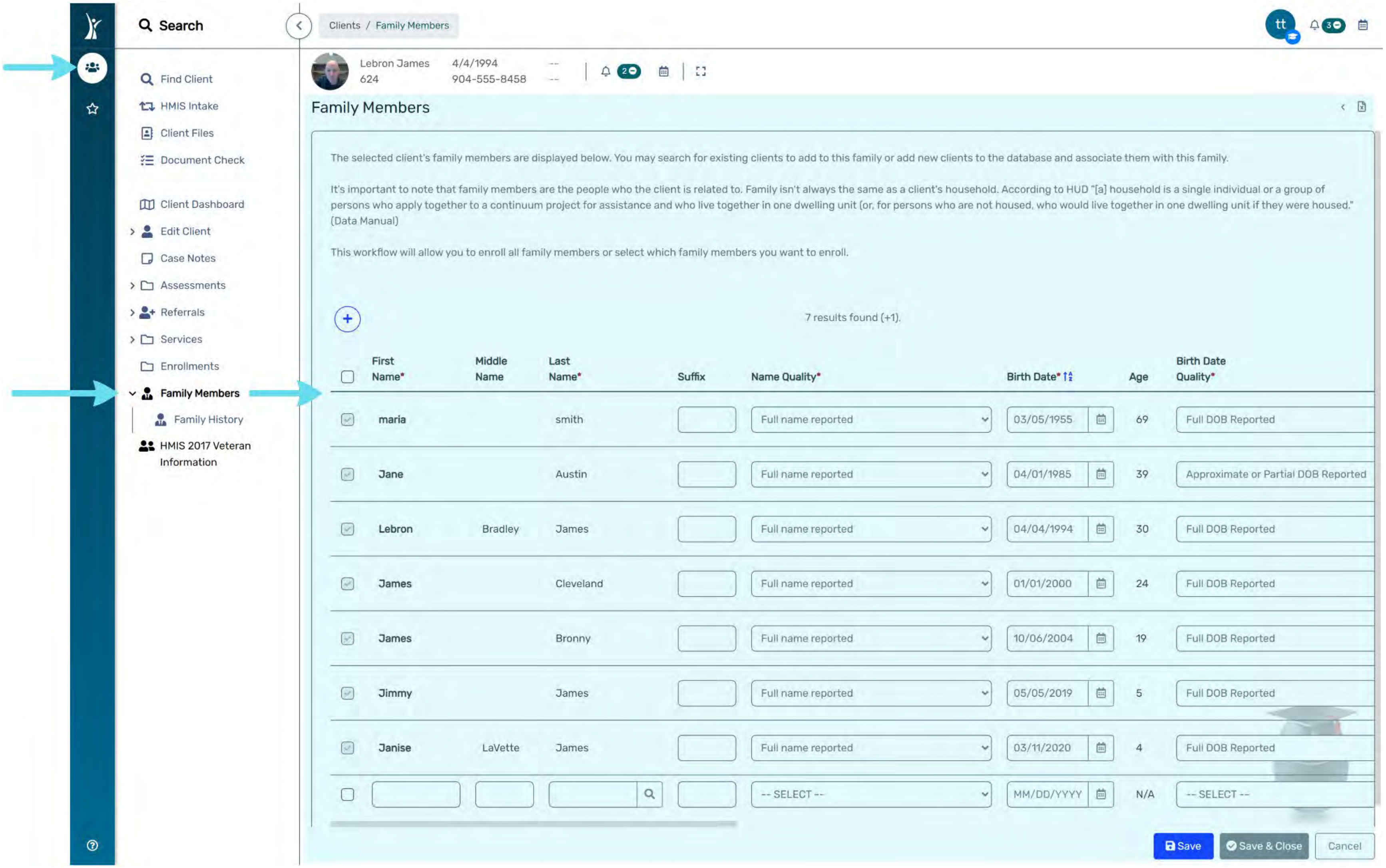
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".*

*** 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 "Family Members" secondary sidebar* menu option. ClientTrack will navigate to the "Family Members" workspace container, and a dropdown menu will appear under the "Family Members" folder.

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

Family Members

The selected client's family members are displayed below. You may search for existing clients to add to this family or add new clients to the database and associate them with this family.

It's important to note that family members are the people who the client is related to. Family isn't always the same as a client's household. According to HUD "[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." (Data Manual)

This workflow will allow you to enroll all family members or select which family members you want to enroll.

7 results found (+1).

☐	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date*	Age	Birth Date Quality*
☑	maria		smith		Full name reported	03/05/1955	69	Full DOB Reported
☑	Jane		Austin		Full name reported	04/01/1985	39	Approximate or Partial DOB Reported
☑	Lebron	Bradley	James		Full name reported	04/04/1994	30	Full DOB Reported
☑	James		Cleveland		Full name reported	01/01/2000	24	Full DOB Reported
☑	James		Bronny		Full name reported	10/06/2004	19	Full DOB Reported
☑	Jimmy		James		Full name reported	05/05/2019	5	Full DOB Reported
☑	Janise	LaVette	James		Full name reported	03/11/2020	4	Full DOB Reported
☐					-- SELECT --	MM/DD/YYYY	N/A	-- SELECT --

Figure 4-126 – Navigate to Family Members Folder

Family Member Information Anatomy

7 results found.

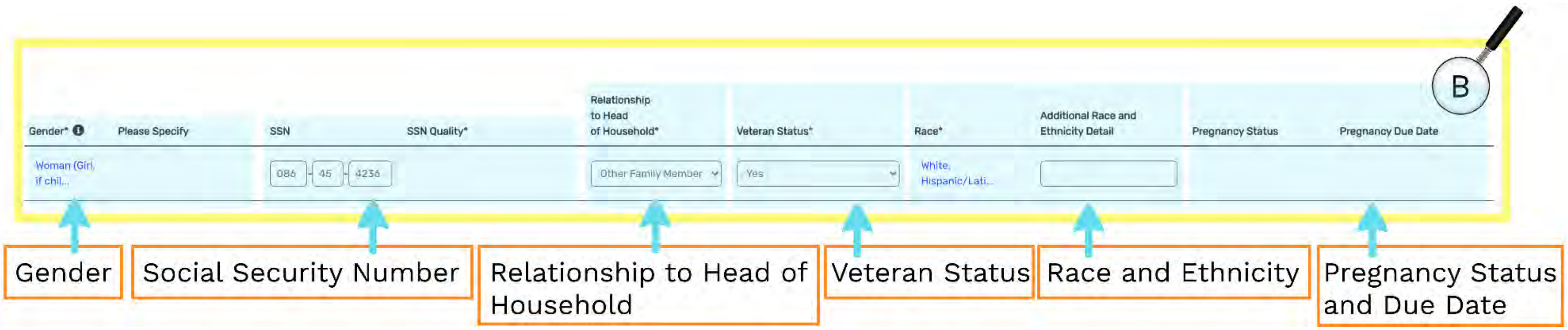
☐	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date*	Age	Birth Date Quality*	Gender*	Please Specify	SSN	SSN Quality*	Relationship to Head of Household*	Veteran Status*	Race*	Additional Race and Ethnicity Detail	Pregnancy Status	Pregnancy Due Date
☐	maria		smith		Full name reported	03/05/1955	69	Full DOB Reported	Woman (Girl, if chi...		[illegible]		Other Family Member	Yes	White, Hispanic/Lati...			

Figure 4-127 – Family Member Information Anatomy

7 results found.

☐	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date*	Age	Birth Date Quality*
☐	maria		smith		Full name reported	03/05/1955	69	Full DOB Reported

Figure 4-128.za – Family Member Information Anatomy



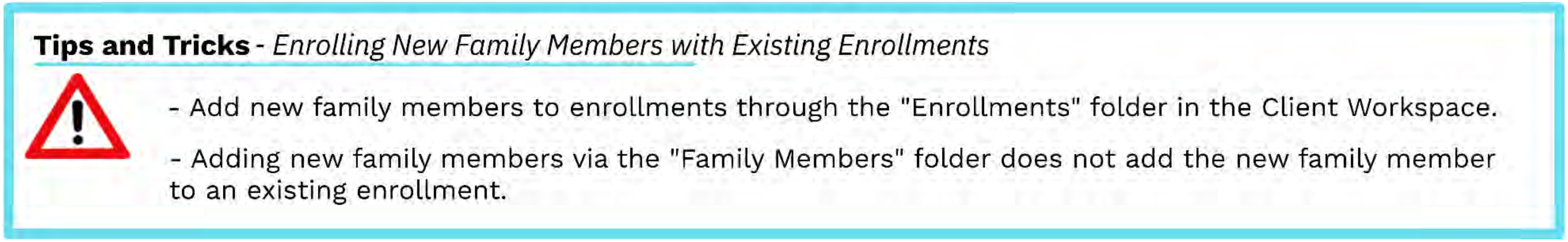
Gender*	Please Specify	SSN	SSN Quality*	Relationship to Head of Household*	Veteran Status*	Race*	Additional Race and Ethnicity Detail	Pregnancy Status	Pregnancy Due Date
Woman (Girl, if chil...		086-45-4236		Other Family Member	Yes	White, Hispanic/Lati...			

Figure 4-129.zb – Family Member Information Anatomy

Adding a New Family Member without An Enrollment

Adding a new family member through the “Family Members” folder adds a new family member without adding them to an enrollment*.

**For instructions on how to add a new family member to a family and add the family member to a family’s existing enrollment, please see Chapter 5 : Basics of Entering Data into ClientTrack/Editing an Existing Enrollment/Editing an Existing Enrollment: Adding A Family Member.*



Tips and Tricks - *Enrolling New Family Members with Existing Enrollments*

- Add new family members to enrollments through the "Enrollments" folder in the Client Workspace.

- Adding new family members via the "Family Members" folder does not add the new family member to an existing enrollment.

Figure 4-130 - – Tips and Tricks – Enrolling New Family Members with Existing Enrollments

Steps to Adding A New Family Member without An Enrollment

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".*

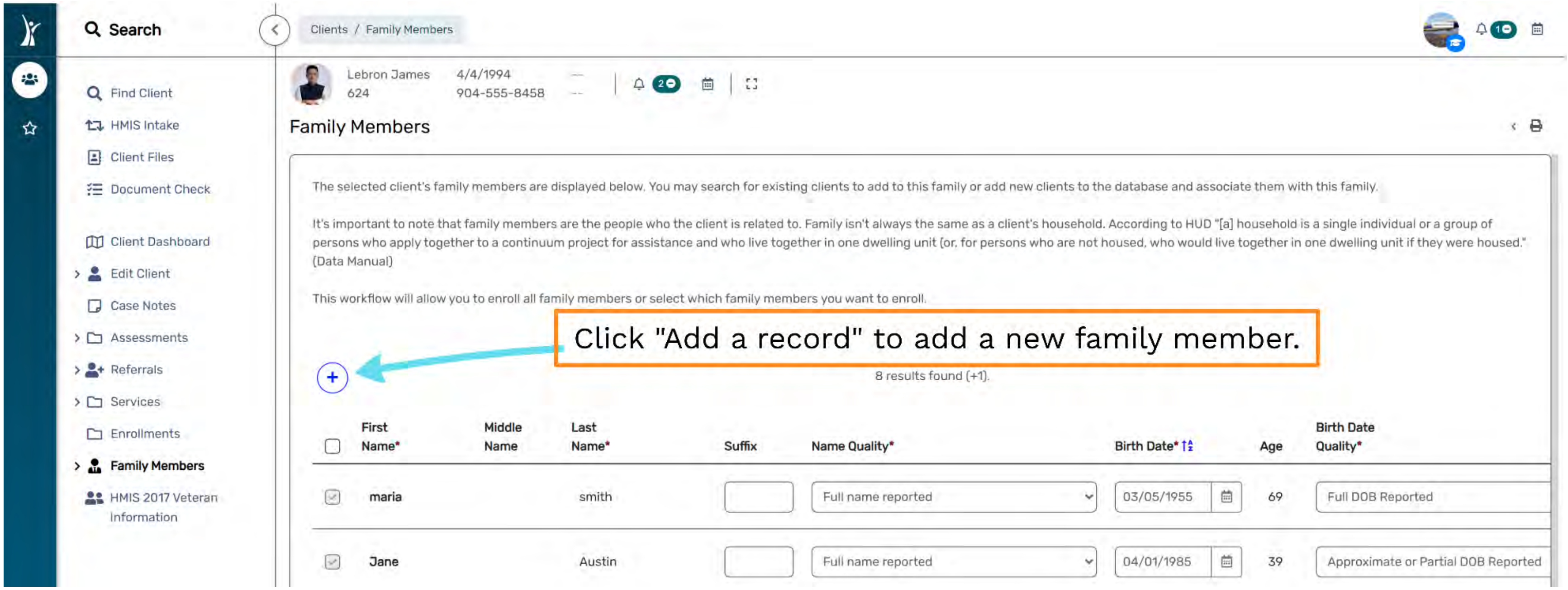
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".*

**** 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 "Family Members" secondary sidebar* menu option. ClientTrack will navigate to the "Family Members" workspace container, and a dropdown menu will appear under the "Family Members" folder.

**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".*

Step 3: Select the "Add a Record" plus sign icon in the "Family Members" workspace container or scroll down and select inside an empty box below the last family member. Fill out information as applicable. Required elements are marked with a (*).



Family Members

The selected client's family members are displayed below. You may search for existing clients to add to this family or add new clients to the database and associate them with this family.

It's important to note that family members are the people who the client is related to. Family isn't always the same as a client's household. According to HUD "[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." (Data Manual)

This workflow will allow you to enroll all family members or select which family members you want to enroll.

Click "Add a record" to add a new family member.

8 results found (+1).

☐	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date*	Age	Birth Date Quality*
☑	maria		smith		Full name reported	03/05/1955	69	Full DOB Reported
☑	Jane		Austin		Full name reported	04/01/1985	39	Approximate or Partial DOB Reported

Figure 4-131 – Add a New Family Member without an Adding to An Enrollment

Family History: Subfolder

The “Family History” subfolder menu option is a record of a client’s family/household history. It will indicate the client’s current family/household.

<u>Steps to Navigate to the “Family History” Subfolder</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 "Family Members" secondary sidebar* menu option. ClientTrack will navigate to the "Family Members" workspace container, and a dropdown menu will appear under the "Family Members" folder.

**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".*

Step 3: Select the "Family History" subfolder from the dropdown menu on the secondary sidebar* menu option.

Favorites Menu

The Favorites Menu allows users to pin preferred menu options. Favorited menu options can be managed and customized.

Steps to Navigate to the "Family History" Subfolder

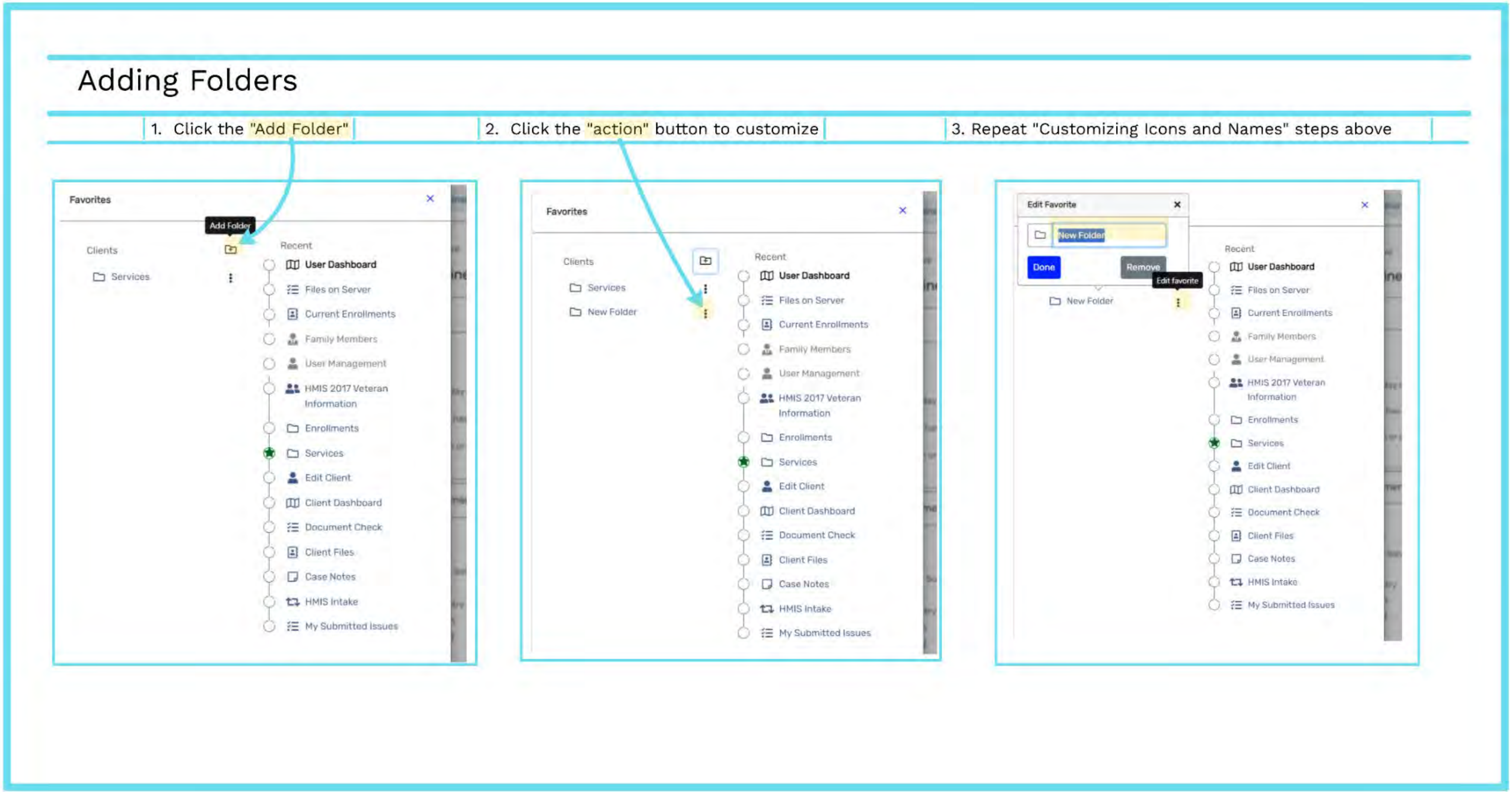
Step 1: Select the Favorites icon* sidebar** menu option***.

** 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 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".*

**** 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: A pop-out screen will appear.



Adding Folders

1. Click the "Add Folder"
2. Click the "action" button to customize
3. Repeat "Customizing Icons and Names" steps above

Figure 4-132 – Tips and Tricks – Adding Folders to Favorites Call Out Menu

Tips and Tricks - *Customizing Favorite Items*

You can customize favorite Items by adding folders, editing favorite titles, and customizing favorite icons.

Customizing Icons and Names

1. Click the "action" icon to edit favorite.
2. Click the inside the "Edit Favorite text" box or folder icon to customize.

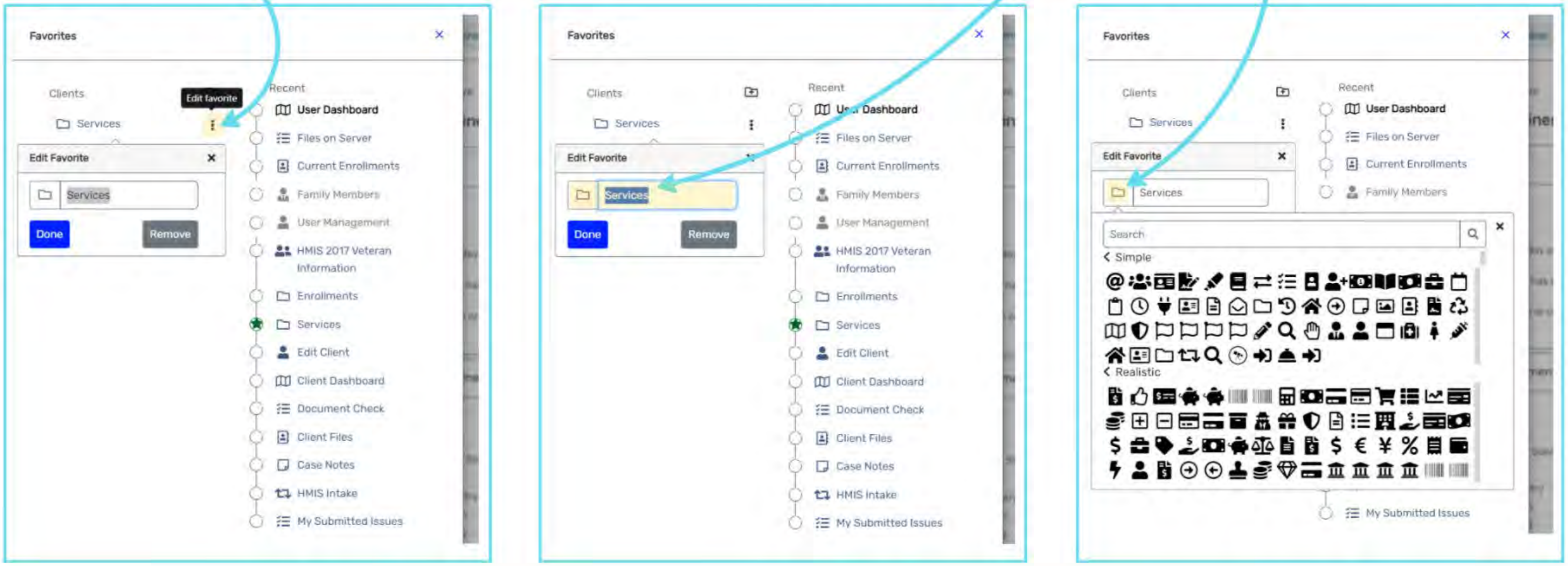


Figure 4-133 – Tips and Tricks – Customizing Favorite Items

Help Center

The most common way to get help with ClientTrack is the contact the HMIS Systems Team at hmis@changinghomelessness.org. No Personally Identifiable Information (PII) is allowed to be sent via email. However, submitting an issue via ClientTrack's Help Center* is also an option for all users.

** See Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/How to Submit an Issue Ticket for instructions on how to submit Issues tickets.*

When requesting changes in the HMIS inbox or via ClientTrack's Help Center, please be sure to include fundamental information.

For example, a request for an enrollment change can include,

1. The client number, aka, HMIS/ClientTrack ID # (do not include any PII {personal identifiable information} in unencrypted emails).
2. Original enrollment type - Example - "CoC FL-510 Coordinated Entry"
3. Enrollment change request name - Example - "HP FL 510 SSVF Intake Navigation Prevention"
4. Enrollment start date
5. Change requested and why

Including information in the example above helps prevent accidental mistakes such as, but not limited to:

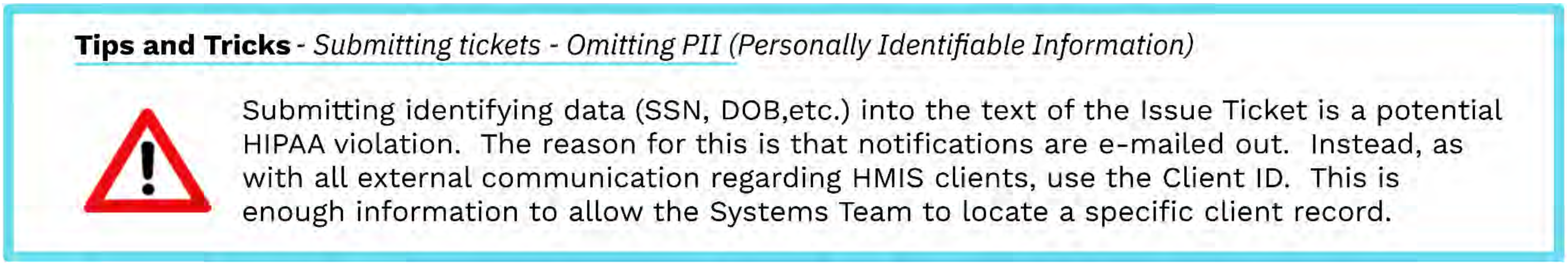
- Typos in an HMIS # resulting in the wrong client being referenced.
- Enrollments change requests that are requested for incorrect reasons.

Requests are typically acknowledged within 72 hours.

It is important for users to follow up on any issues submitted* in a timely manner.

** See Chapter 3: Home Workspace: Menu Options, Folders and subfolders/My Submitted Issues: Subfolder/Steps to Respond to Tickets in My Submitted Issues for instructions on how to respond to My Submitted Issues tickets.*

How to Submit an Issue Ticket



Tips and Tricks - *Submitting tickets - Omitting PII (Personally Identifiable Information)*

Submitting identifying data (SSN, DOB,etc.) into the text of the Issue Ticket is a potential HIPAA violation. The reason for this is that notifications are e-mailed out. Instead, as with all external communication regarding HMIS clients, use the Client ID. This is enough information to allow the Systems Team to locate a specific client record.

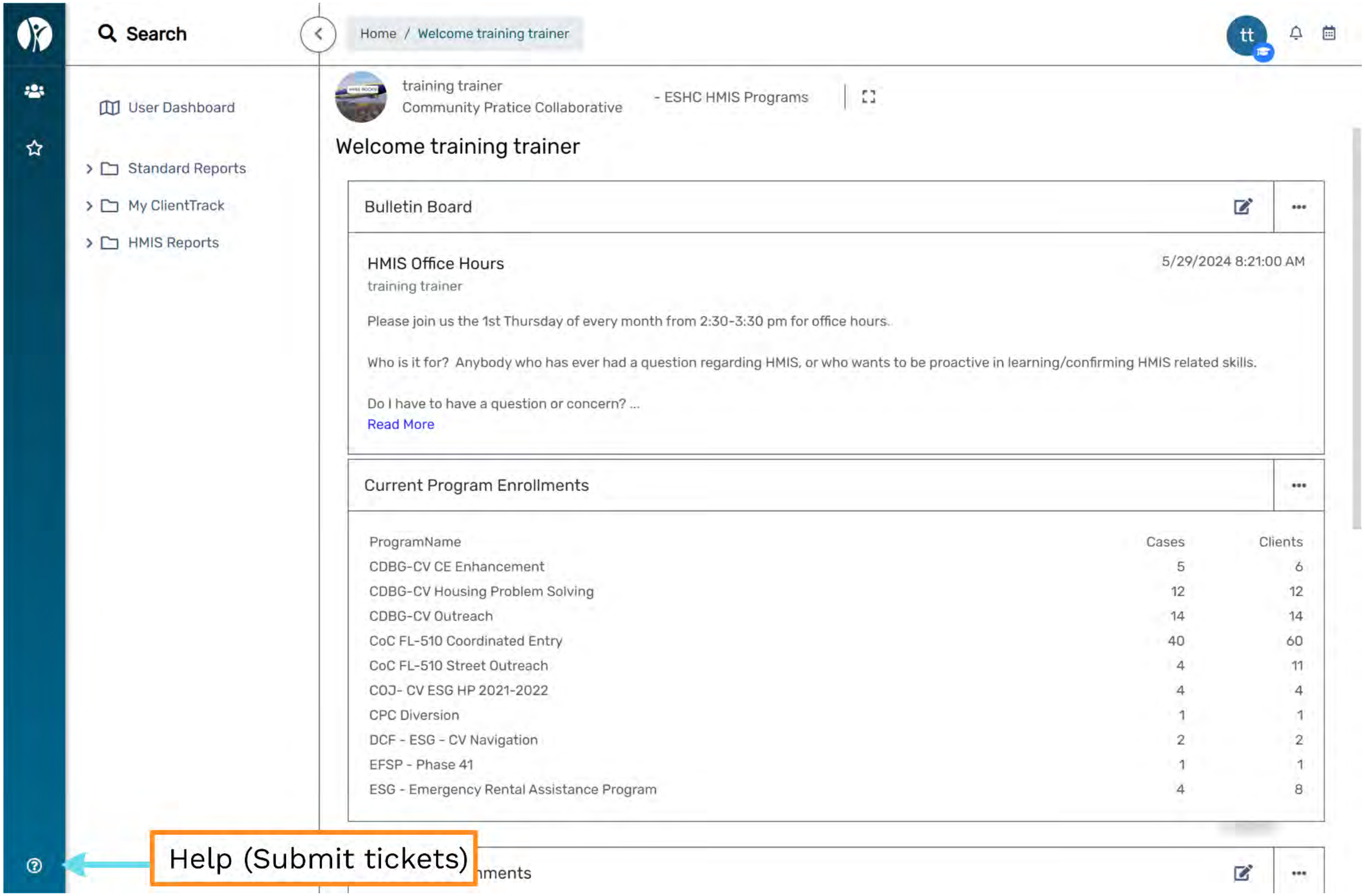
Figure 4-134 – Submitting Tickets and PII (Personally Identifiable Information)

Steps to submit a new Issue Ticket via ClientTrack

Step 1: Click on the “Help” icon* at the bottom of the sidebar**. If an issue is regarding a ClientTrack feature, click the “Help” icon on the page that you are having an issue with.

** 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 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”.*



training trainer
Community Pratice Collaborative - ESHC HMIS Programs

Welcome training trainer

Bulletin Board

HMIS Office Hours 5/29/2024 8:21:00 AM
training trainer

Please join us the 1st Thursday of every month from 2:30-3:30 pm for office hours.

Who is it for? Anybody who has ever had a question regarding HMIS, or who wants to be proactive in learning/confirming HMIS related skills.

Do I have to have a question or concern? ...
Read More

Current Program Enrollments

ProgramName	Cases	Clients
CDBG-CV CE Enhancement	5	6
CDBG-CV Housing Problem Solving	12	12
CDBG-CV Outreach	14	14
CoC FL-510 Coordinated Entry	40	60
CoC FL-510 Street Outreach	4	11
COJ- CV ESG HP 2021-2022	4	4
CPC Diversion	1	1
DCF - ESG - CV Navigation	2	2
EFSP - Phase 41	1	1
ESG - Emergency Rental Assistance Program	4	8

Figure 4-135 – Help – Submitting Tickets in ClientTrack

Step 2: In the pop-up box that appears, click on “Report an Issue”.

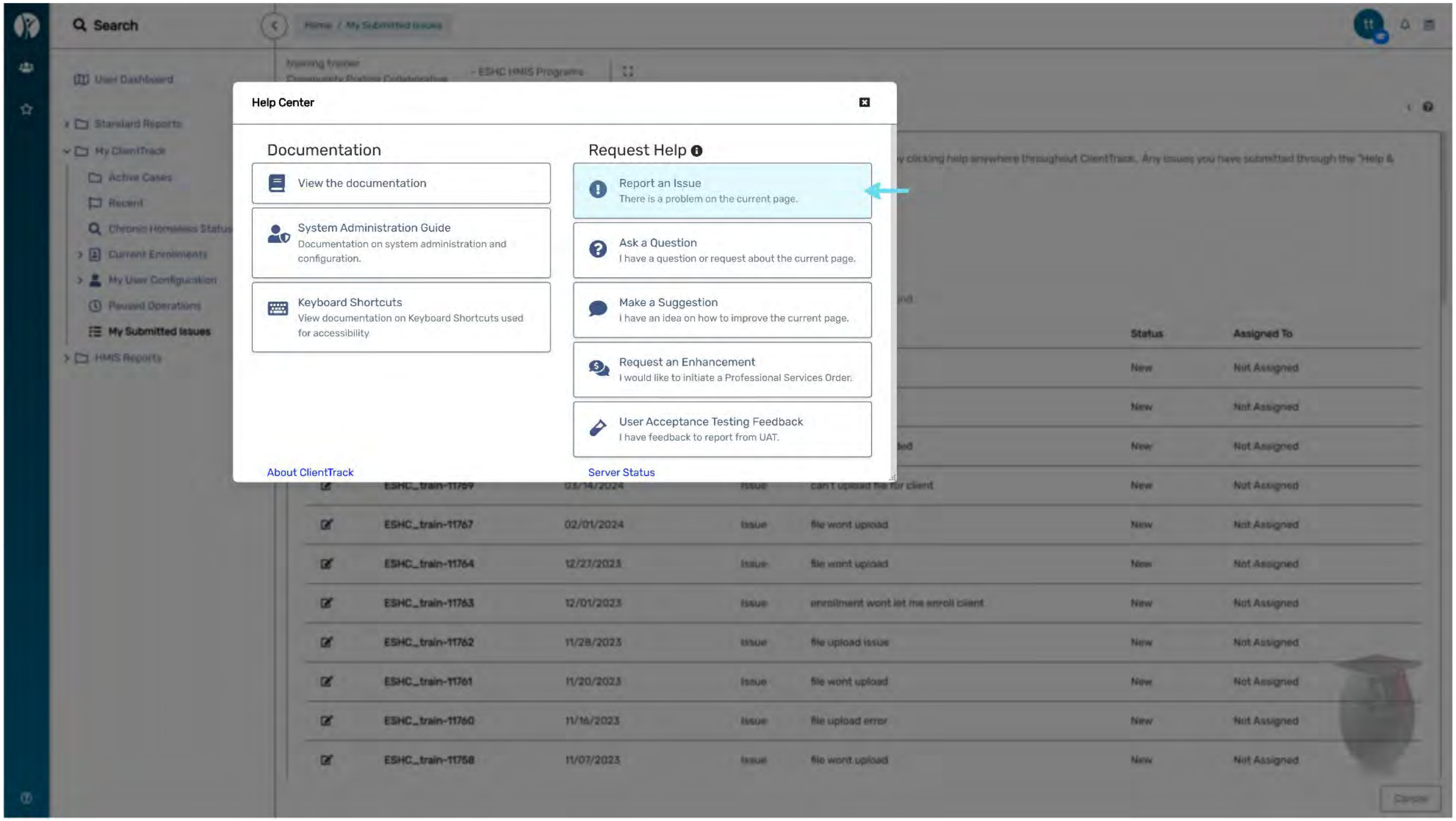
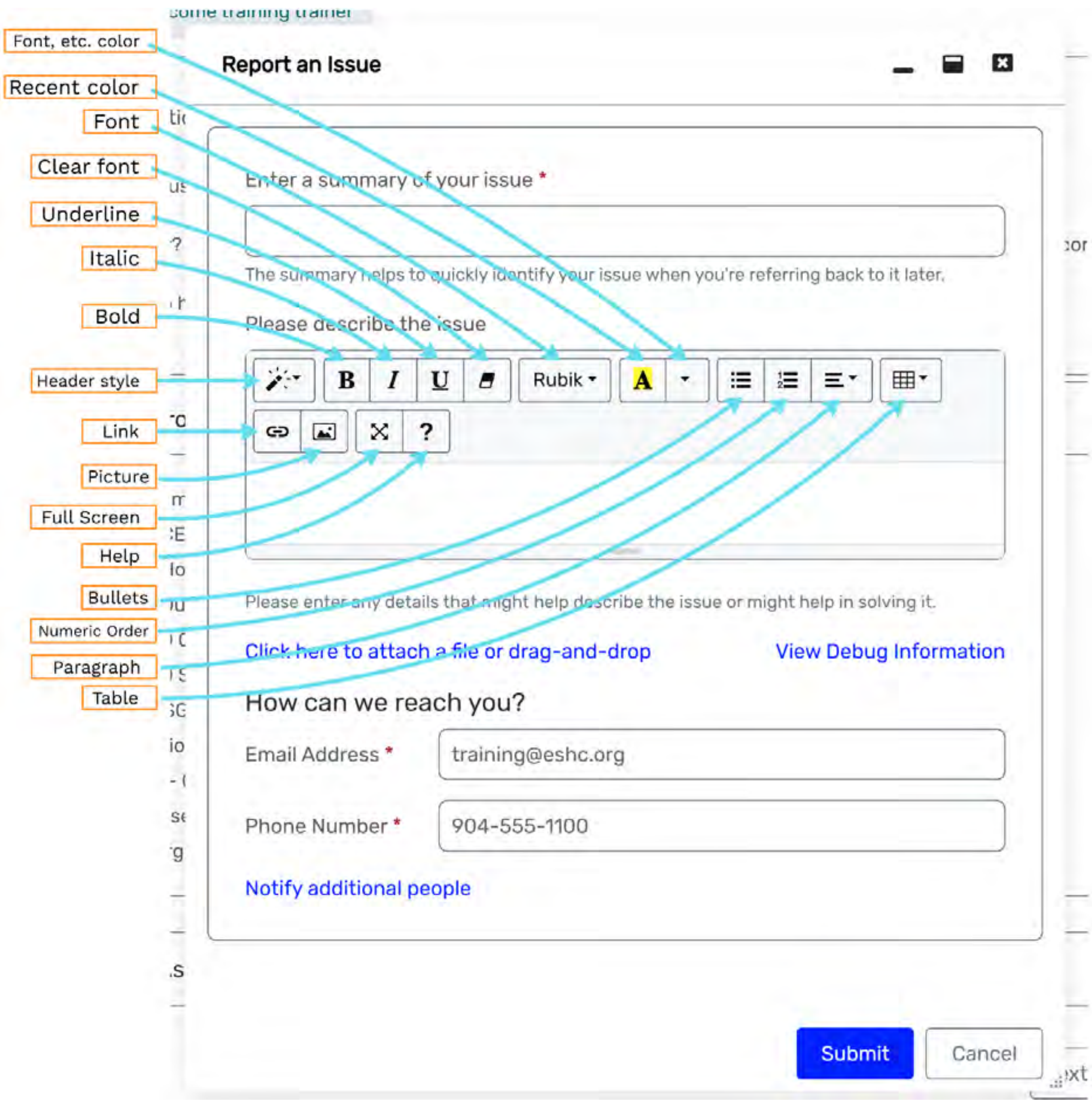


Figure 4-136 - Help – Report an Issue Pop-Out Window

Step 3: A “Report an Issue” pop-up window will appear. Fill out the “Report an Issue” form as applicable. If the issue concerns a client(s), use only the client ID as an identifier. Required elements are marked with a (*).



Report an Issue

Enter a summary of your issue *

The summary helps to quickly identify your issue when you're referring back to it later.

Please describe the issue

Please enter any details that might help describe the issue or might help in solving it.

Click here to attach a file or drag-and-drop

View Debug Information

How can we reach you?

Email Address * training@eshc.org

Phone Number * 904-555-1100

Notify additional people

Figure 4-137 – Report an Issue Format Buttons

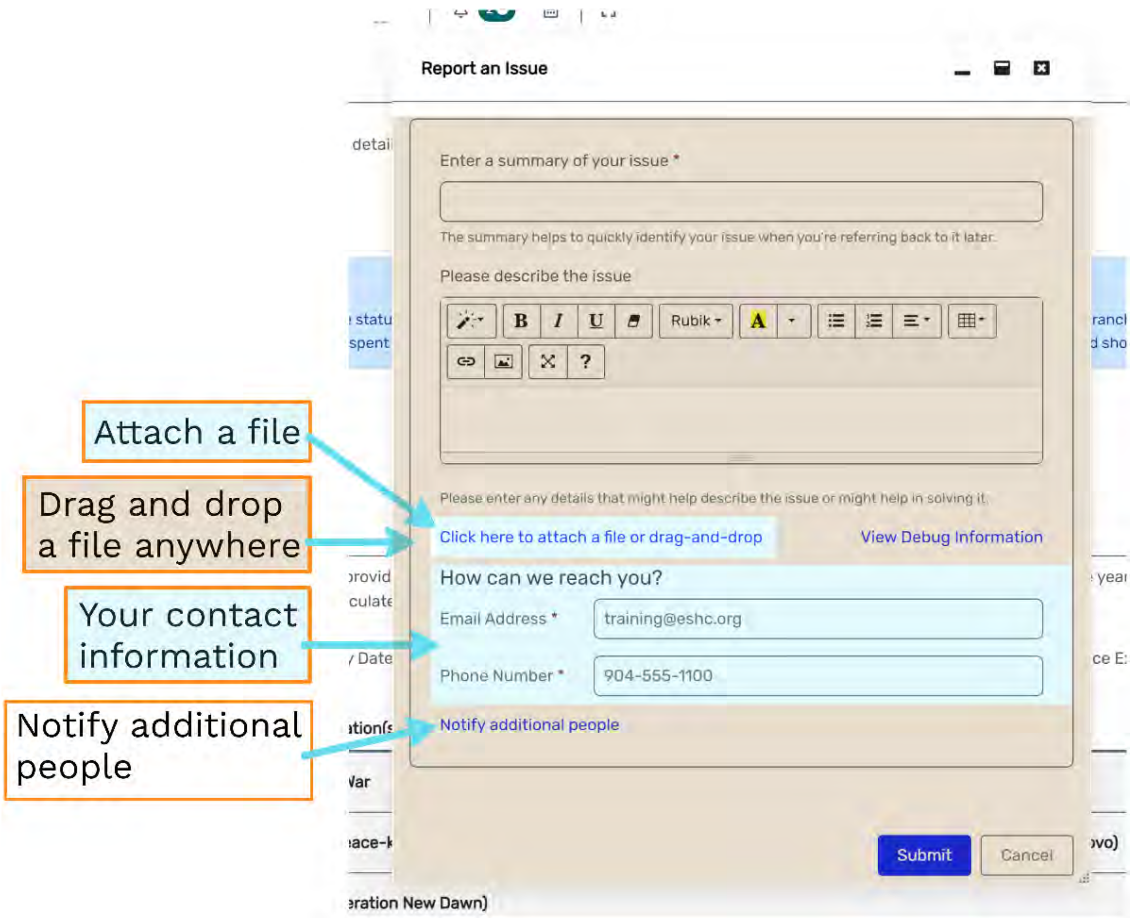
Step 5: (Optional but recommended for more complex issues) Attach a file or screenshot to the issue ticket by clicking on the "Click here to attach a file or drag-and-drop" link. When clicking "Click here to attach or drag-and-drop", a dialogue box will open to select a previously captured image from a local source (computer). The file name of the picture you selected should appear in the "File Name" field. Then click "Open"

A file can be dragged-and-dropped to any location within the "Report an Issue" container space.

More than one file can be added by clicking "Attach another file" and repeating Step 4.

Step 6: The user's HMIS registered e-mail and phone number will automatically populate in the "How can we reach you" section. Verify this information is correct or edit as needed.

Step 7: If applicable, add other people that need to be included on progress on this Issue Ticket by clicking on "Notify Additional People".



Attach a file

Drag and drop a file anywhere

Your contact information

Notify additional people

Report an Issue

Enter a summary of your issue *

The summary helps to quickly identify your issue when you're referring back to it later.

Please describe the issue

Please enter any details that might help describe the issue or might help in solving it.

How can we reach you?

Email Address * training@eshc.org

Phone Number * 904-555-1100

Figure 4-138 – Report an Issue Additional Anatomy

Step 8: When ready to submit an issue ticket, click “Submit”. To view submitted issues, navigate to the “My Submitted Issues”* subfolder.

** See Chapter 3: Home Workspace: Menu Options, Folders and subfolders/My Submitted Issues: Subfolder/*

Chapter 5 : Basics of Entering Data into ClientTrack

Client data is collected at three main points in the client's participation in a program: intake, case management, exit. ClientTrack* has functions to prevent incorrect or incomplete data from being entered. Familiarizing with how these functions work (and how they do not work) will help in keeping these errors to a minimum.

HUD* mandates inputting data into HMIS within 24 hours from the interaction with the client(s). Data input timeframes are monitored by ClientTrack and HUD.

** For online resources related to ClientTrack, see Introduction/[Online Resources](#) in the "HMIS Basic User 2025 Manual".*

Data Entry Points

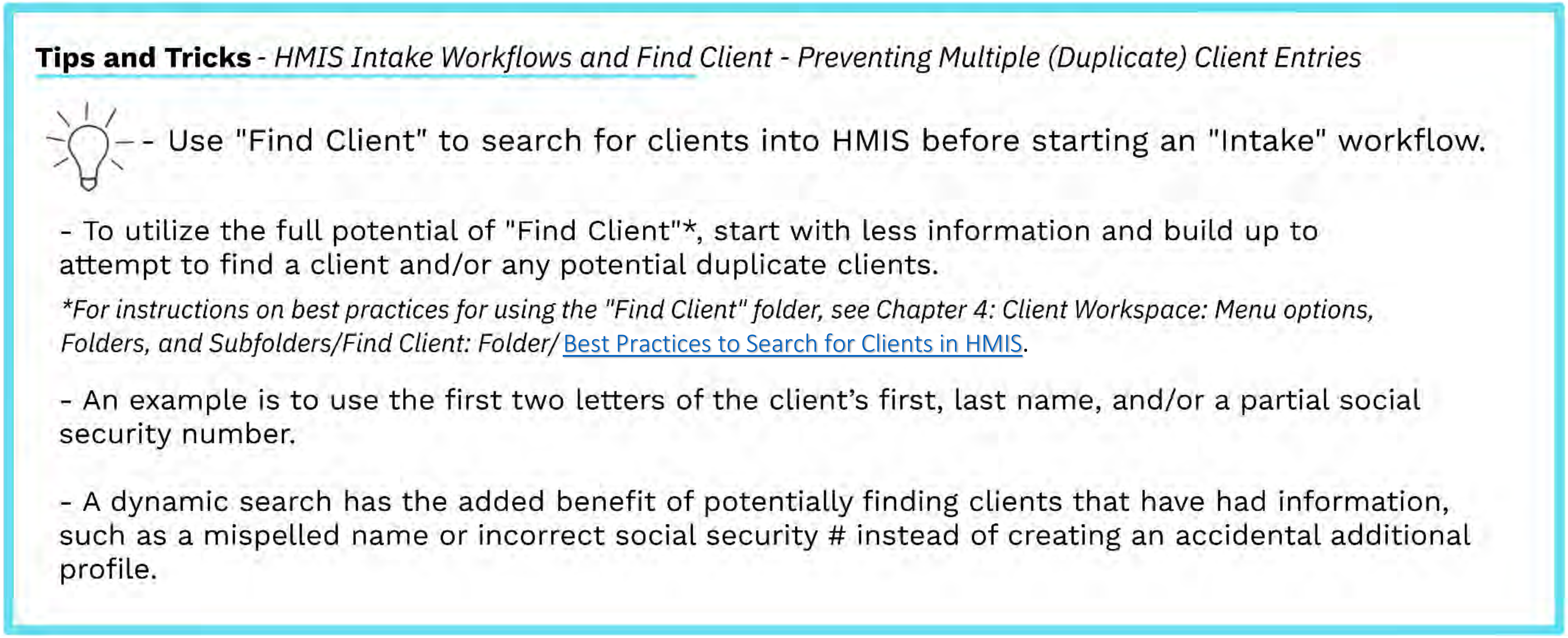
Figure 5-1 – Data Entry Points

ClientTrack Workflows

ClientTrack utilizes built “Workflows**”*** for a given data collection process. Using “Workflows**”** ensures that important steps in a process are taken, and that resulting reports can populate correct data.

**For basic anatomy and methodology on “Intake Workflows”, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/HMIS Intake: Folder*

Navigating through a Workflow



Tips and Tricks - *HMIS Intake Workflows and Find Client - Preventing Multiple (Duplicate) Client Entries*

- Use "Find Client" to search for clients into HMIS before starting an "Intake" workflow.

- To utilize the full potential of "Find Client"*, start with less information and build up to attempt to find a client and/or any potential duplicate clients.

**For instructions on best practices for using the "Find Client" folder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/ Best Practices to Search for Clients in HMIS*.

- An example is to use the first two letters of the client’s first, last name, and/or a partial social security number.

- A dynamic search has the added benefit of potentially finding clients that have had information, such as a mispelled name or incorrect social security # instead of creating an accidental additional profile.

Figure 5-2. T6 – Preventing Multiple Client Entries

A “Workflow**”*** is a series of forms that constitute a data gathering process. Each time a Workflow in ClientTrack is initiated, a “Workflow Navigation Pane” will open to the right of the secondary sidebar**.

**For basic anatomy and methodology on “Intake Workflows”, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/HMIS Intake: Folder*

****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”.*

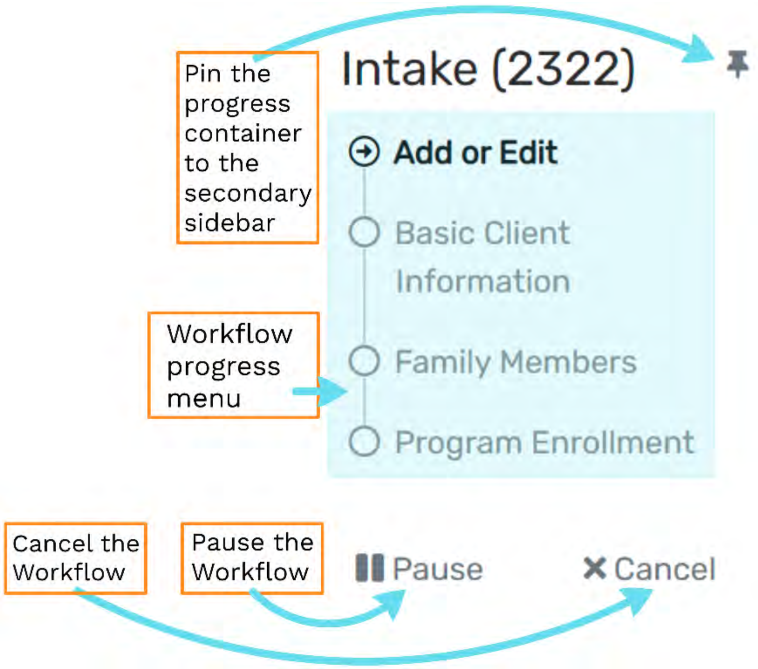
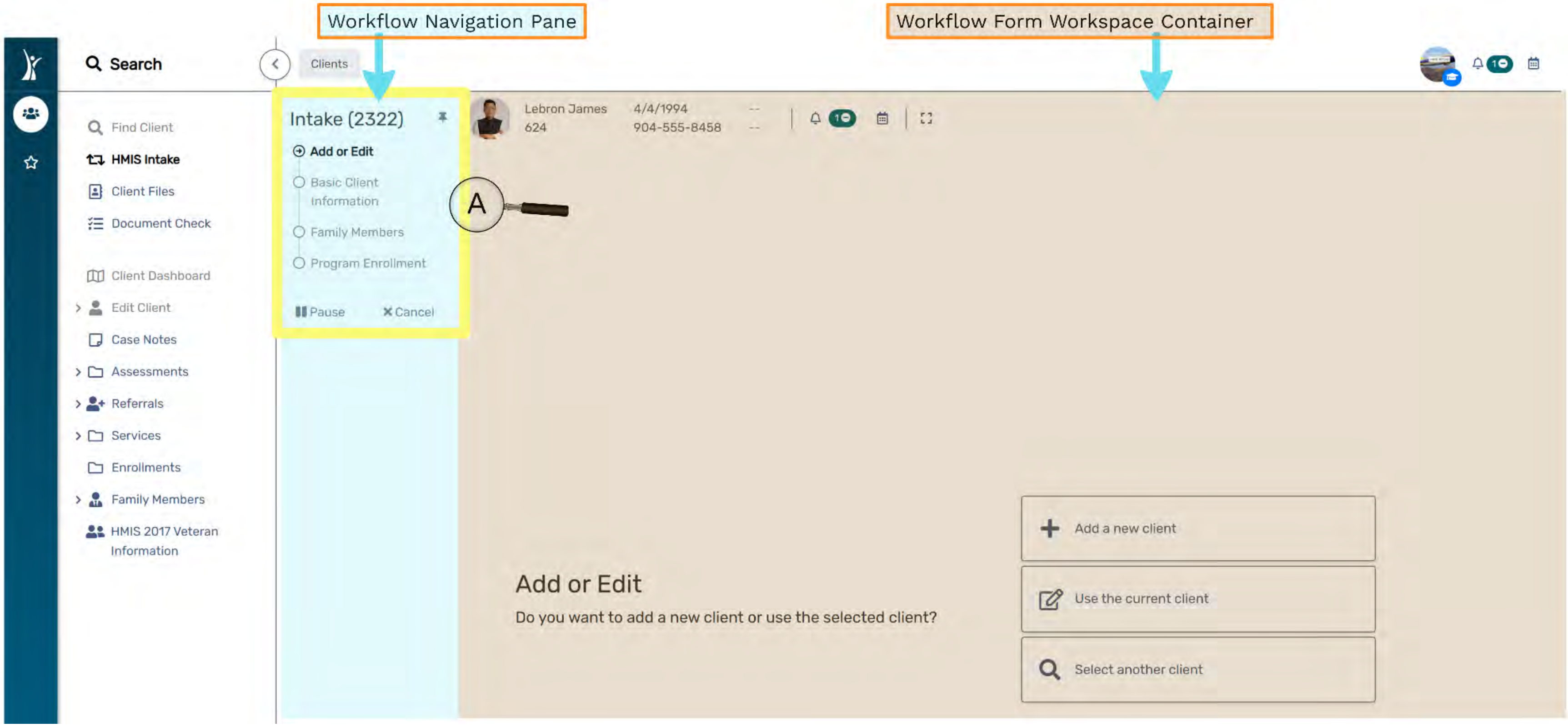


Figure 5-3 – Workflow Navigation Pane Anatomy



Add or Edit

Do you want to add a new client or use the selected client?

Figure 5-4 – Workflow Anatomy

ClientTrack is designed to accommodate data collection needs for unique programs. A workflow adjusts dynamically based on a variety of criteria. As a workflow progresses, workflow form workspace containers change and dynamic progress is distinguishable via bold font in the workflow navigation pane.

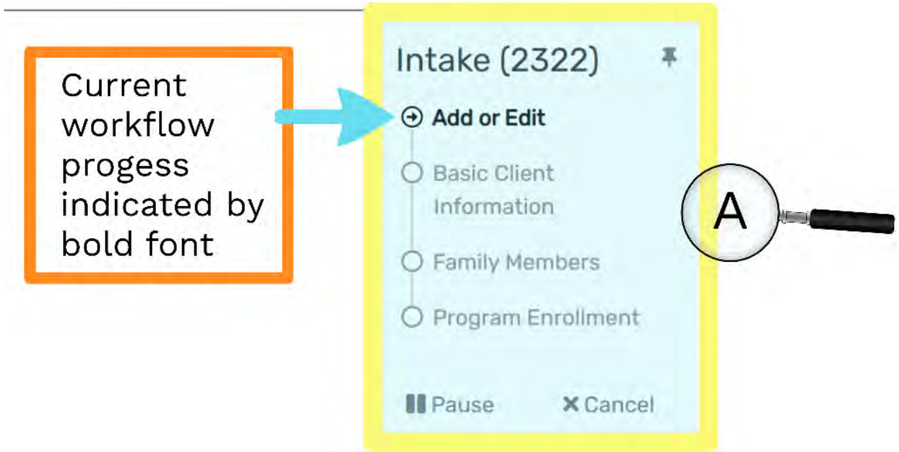
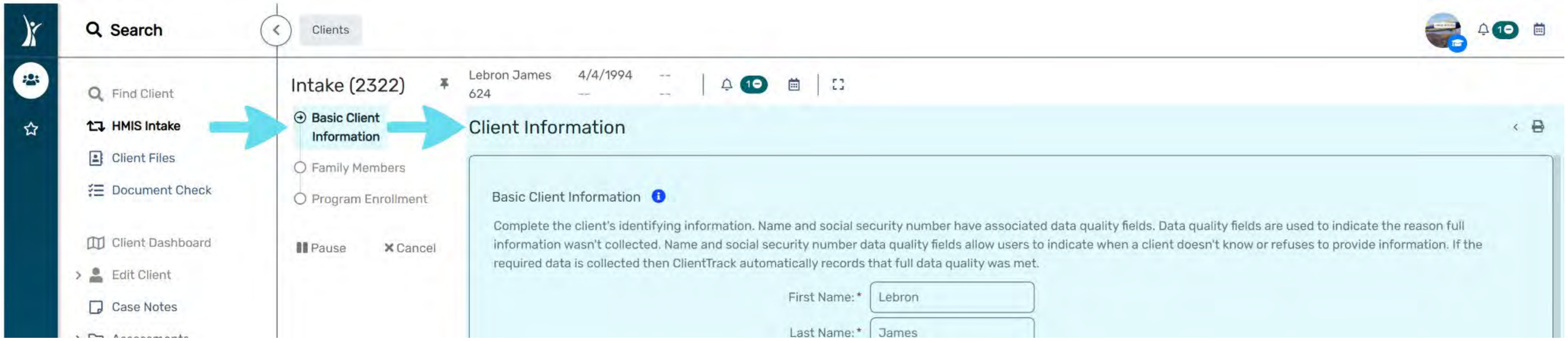


Figure 5-5 – Workflow Navigation Pane Progress

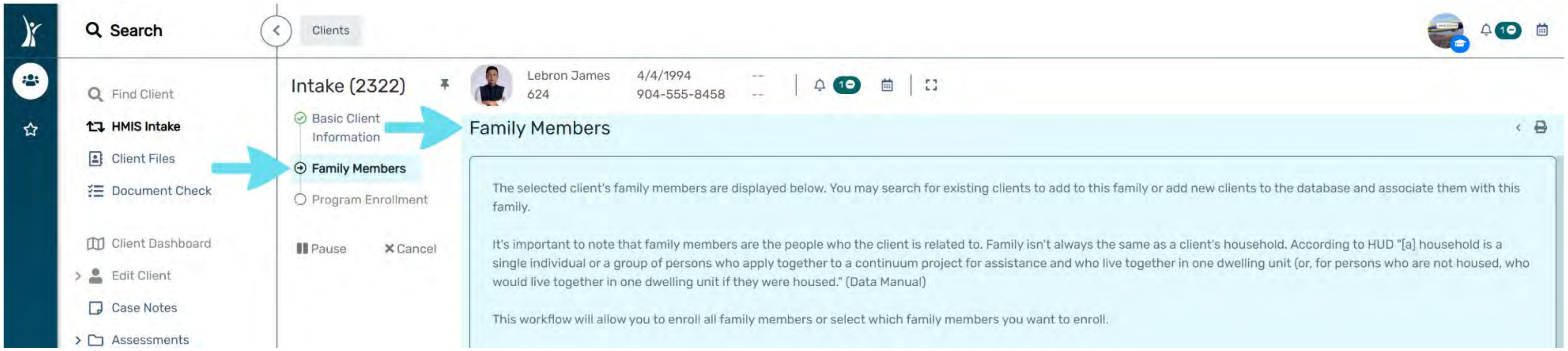


Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name:* Lebron

Last Name:* James

Figure 5-6 – Workflow Navigation Pane Progress

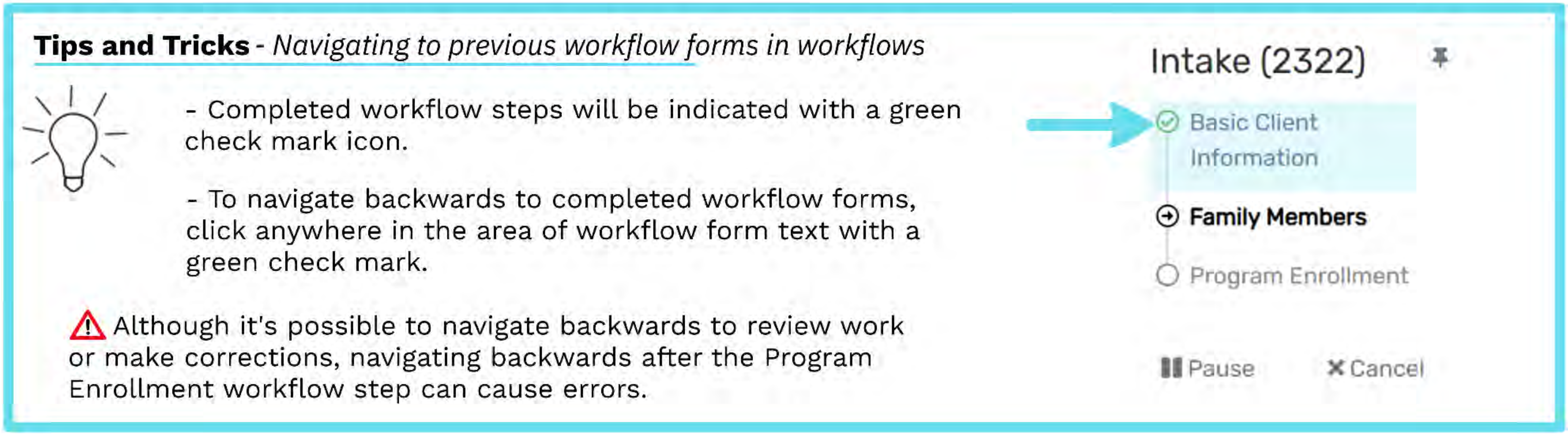


The selected client's family members are displayed below. You may search for existing clients to add to this family or add new clients to the database and associate them with this family.

It's important to note that family members are the people who the client is related to. Family isn't always the same as a client's household. According to HUD "[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." (Data Manual)

This workflow will allow you to enroll all family members or select which family members you want to enroll.

Figure 5-7 - Workflow Navigation Pane Progress



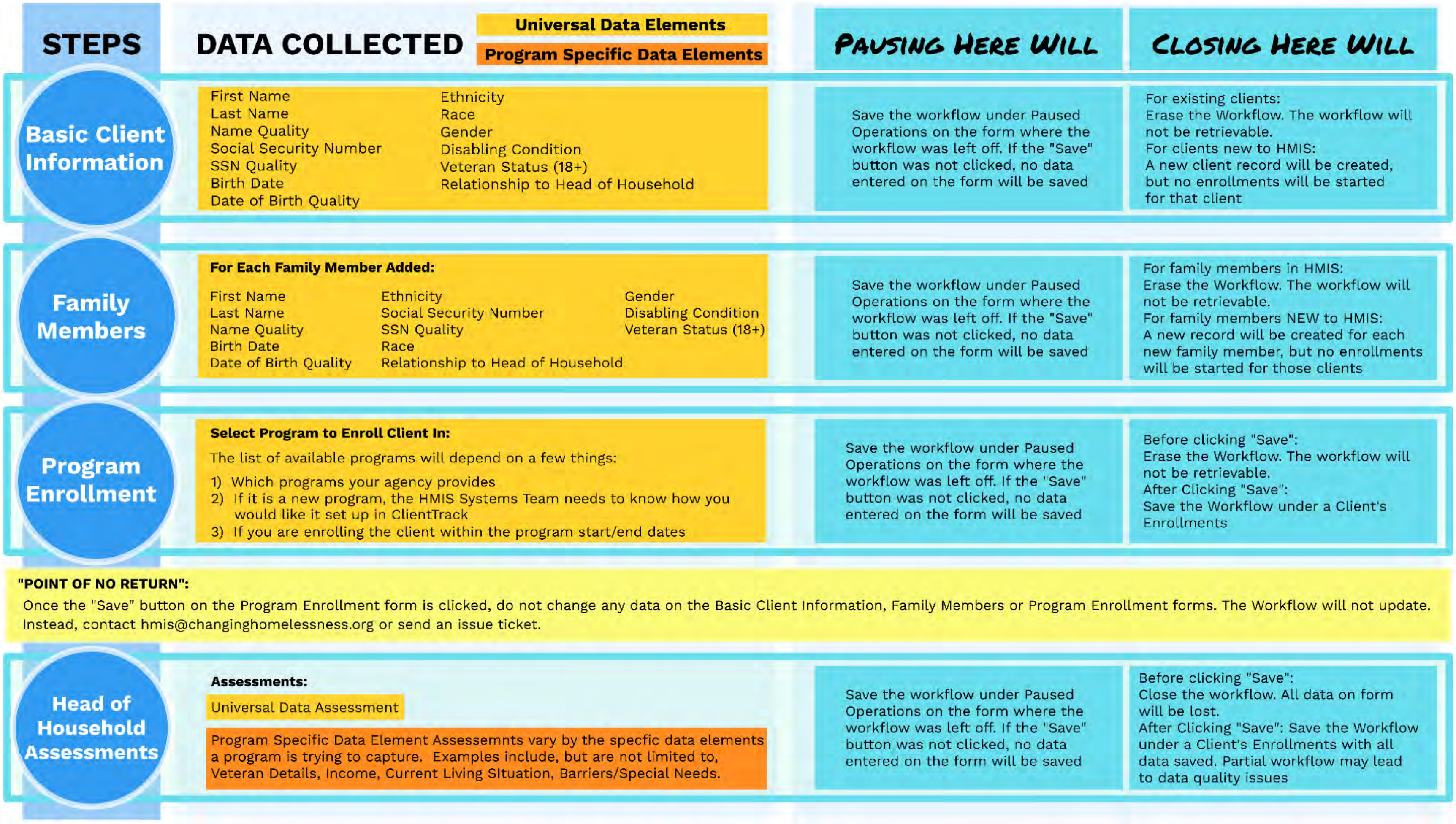
Tips and Tricks - *Navigating to previous workflow forms in workflows*

- Completed workflow steps will be indicated with a green check mark icon.

- To navigate backwards to completed workflow forms, click anywhere in the area of workflow form text with a green check mark.

⚠ Although it's possible to navigate backwards to review work or make corrections, navigating backwards after the Program Enrollment workflow step can cause errors.

Figure 5-8 – Tips and Tricks – Navigating to Previous Workflow Forms in Workflows



Universal Data Elements

Program Specific Data Elements

STEPS	DATA COLLECTED	PAUSING HERE WILL	CLOSING HERE WILL
Basic Client Information	First Name Last Name Name Quality Social Security Number SSN Quality Birth Date Date of Birth Quality Ethnicity Race Gender Disabling Condition Veteran Status (18+) Relationship to Head of Household	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	For existing clients: Erase the Workflow. The workflow will not be retrievable. For clients new to HMIS: A new client record will be created, but no enrollments will be started for that client
Family Members	**For Each Family Member Added:** First Name Last Name Name Quality Birth Date Date of Birth Quality Ethnicity Social Security Number SSN Quality Race Relationship to Head of Household Gender Disabling Condition Veteran Status (18+)	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	For family members in HMIS: Erase the Workflow. The workflow will not be retrievable. For family members NEW to HMIS: A new record will be created for each new family member, but no enrollments will be started for those clients
Program Enrollment	**Select Program to Enroll Client In:** The list of available programs will depend on a few things: 1) Which programs your agency provides 2) If it is a new program, the HMIS Systems Team needs to know how you would like it set up in ClientTrack 3) If you are enrolling the client within the program start/end dates	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	Before clicking "Save": Erase the Workflow. The workflow will not be retrievable. After Clicking "Save": Save the Workflow under a Client's Enrollments
"POINT OF NO RETURN": Once the "Save" button on the Program Enrollment form is clicked, do not change any data on the Basic Client Information, Family Members or Program Enrollment forms. The Workflow will not update. Instead, contact hmis@changinghomelessness.org or send an issue ticket.			
Head of Household Assessments	**Assessments:** Universal Data Assessment Program Specific Data Element Assessemnts vary by the specfic data elements a program is trying to capture. Examples include, but are not limited to, Veteran Details, Income, Current Living SItuation, Barriers/Special Needs.	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	Before clicking "Save": Close the workflow. All data on form will be lost. After Clicking "Save": Save the Workflow under a Client's Enrollments with all data saved. Partial workflow may lead to data quality issues

Figure 5-9 – HMIS Intake Workflow Navigation

Initiating a Workflow (Entry/Exit)

Initiating Entry Workflows (Enrolling Clients in Programs)

Entry workflows are initiated through a "Client Intake." Client Intakes are initiated through the "Client Intake" folder* in the Client Workspace.**

**For information and instructions on the Client Intake folder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders*

*** 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".*

Initiating Exit Workflows (Exiting Clients from Programs)

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".*

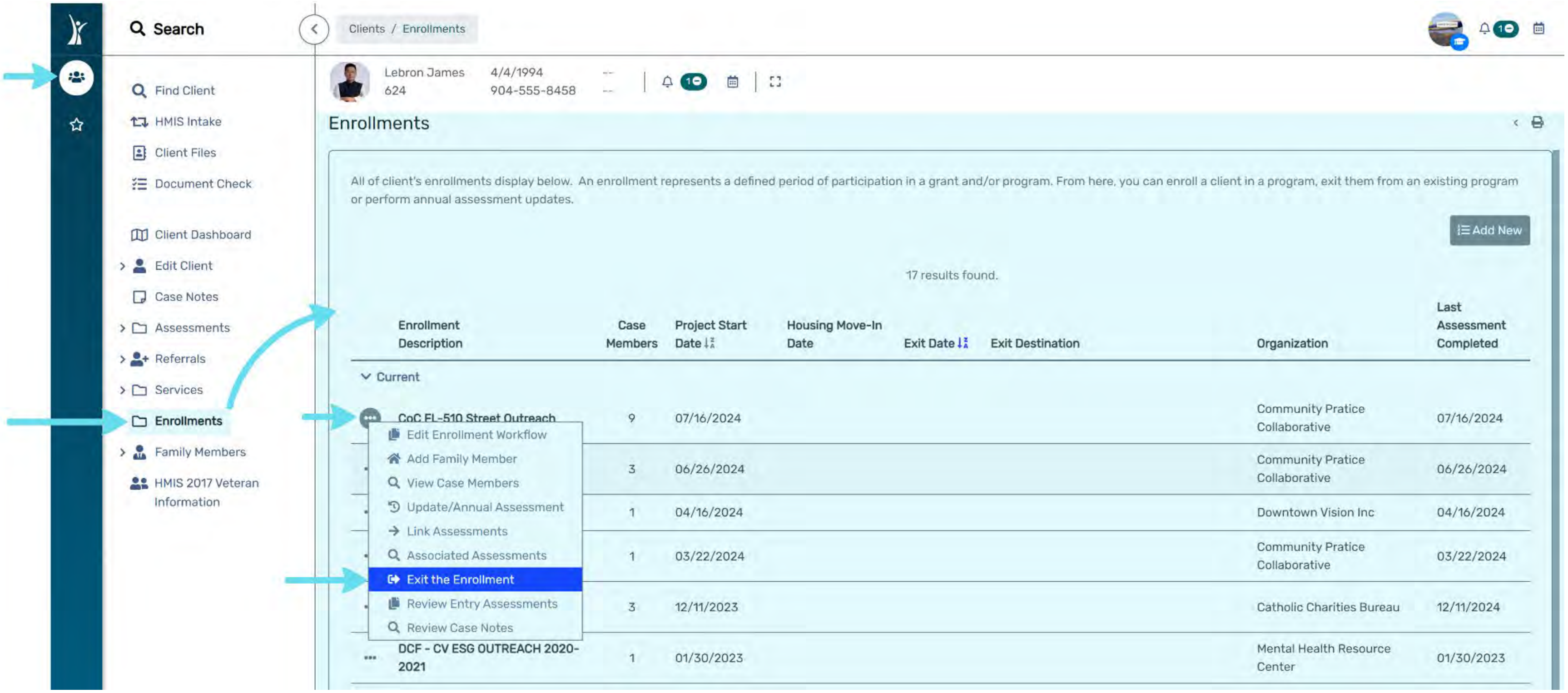
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

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".*

Step 3: Select the action button* next to the appropriate existing enrollment. Select "Exit the Enrollment." ClientTrack will navigate to the Enrollment Exit workflow step in the HUD Program Exit 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".*



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 existing program or perform annual assessment updates.

17 results found.

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	9	07/16/2024				Community Pratice Collaborative	07/16/2024
	3	06/26/2024				Community Pratice Collaborative	06/26/2024
	1	04/16/2024				Downtown Vision Inc	04/16/2024
	1	03/22/2024				Community Pratice Collaborative	03/22/2024
	3	12/11/2023				Catholic Charities Bureau	12/11/2023
DCF - CV ESG OUTREACH 2020-2021	1	01/30/2023				Mental Health Resource Center	01/30/2023

Figure 5-10 – Initiating Client Enrollment Exit

Step 4: Navigate through the workflow*

*** 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”.*

Pausing and Managing Paused Workflows

Pausing a workflow can be helpful but use this with caution. If paused workflows aren’t completed, partial enrollments may cause data errors, and/or two enrollments for the same program may be created.

Pausing a workflow will save all the data you have entered up until the Workflow is paused.

Steps to Pause a Workflow

Open workflows* can be paused using the following steps:

**For information and instructions on navigating through a workflow, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows/Navigating through a Workflow in the “HMIS Basic User 2025 Manual”.*

Step 1: Press the pause button to pause the workflow.

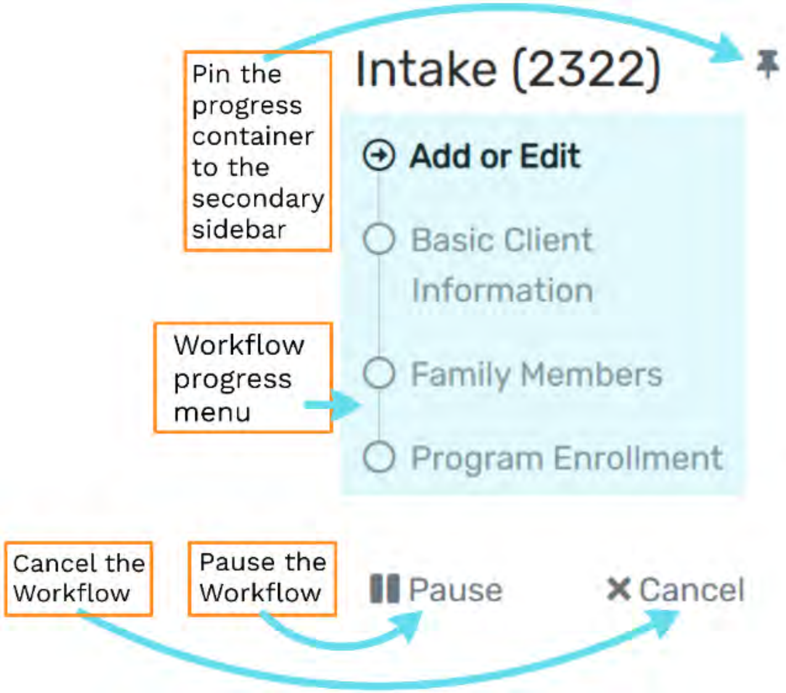


Figure 5-11 – Workflow Navigation Pane Anatomy

Step 2: ClientTrack will confirm you have paused the workflow by presenting a pop-up window. Click OK.

Steps to Resume or Restart a Paused Workflow.

Pause workflows can be viewed and resumed in the "Paused Operations" subfolder.

Step 1: Navigate to the Home 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".*

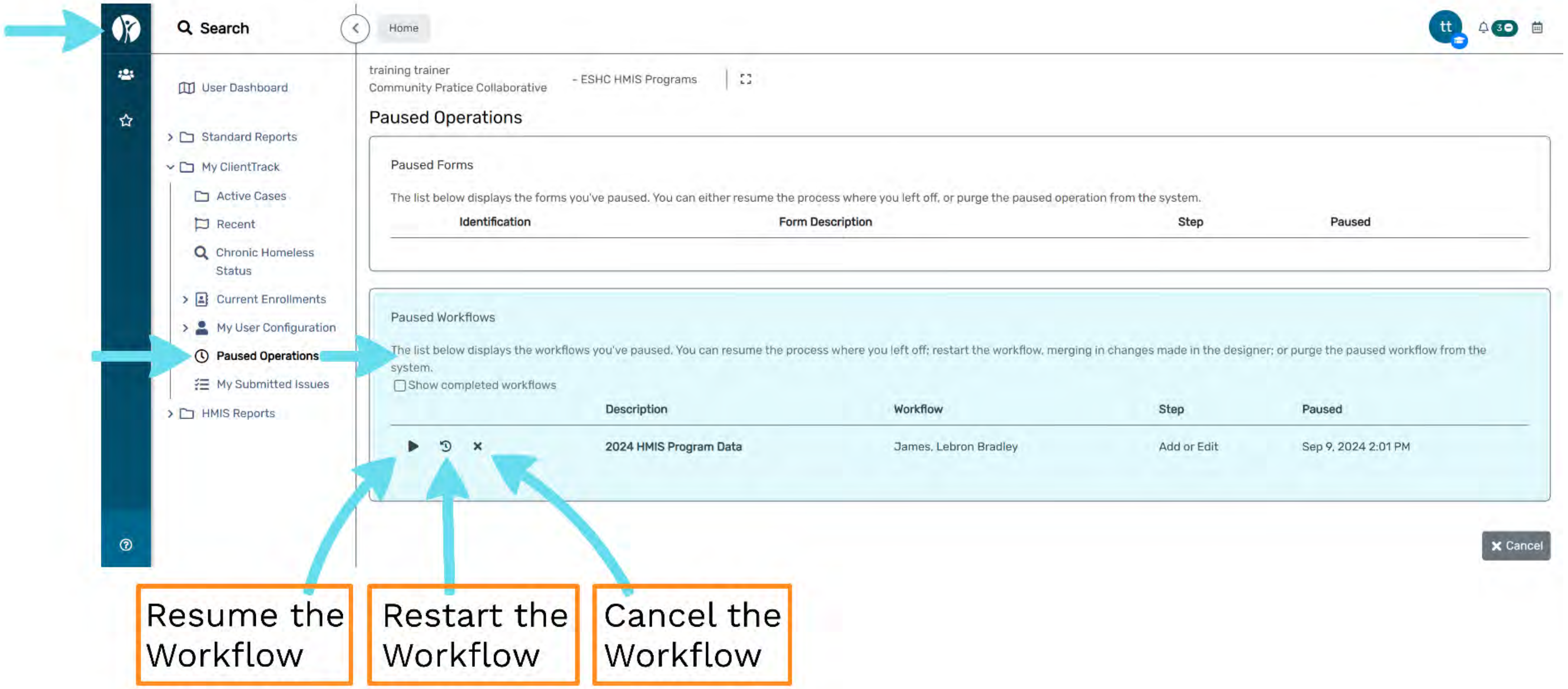
Step 2: Select the "My ClientTrack" secondary sidebar* menu option. A dropdown menu will appear under the "My ClientTrack" folder.

**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".*

Step 3: Under the "My ClientTrack" folder dropdown menu, select the "Paused Operations" subfolder.

Step 4: Select the resume icon* next to the appropriate paused workflow. To restart the enrollment from the beginning of the workflow, select the restart icon. ClientTrack will navigate to the "Client Workspace" and navigate to the workflow navigation pane and workflow 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".*



training trainer
Community Pratice Collaborative - ESHC HMIS Programs

Paused Operations

Paused Forms

The list below displays the forms you've paused. You can either resume the process where you left off, or purge the paused operation from the system.

Identification	Form Description	Step	Paused

Paused Workflows

The list below displays the workflows you've paused. You can resume the process where you left off; restart the workflow, merging in changes made in the designer; or purge the paused workflow from the system.

☐ Show completed workflows

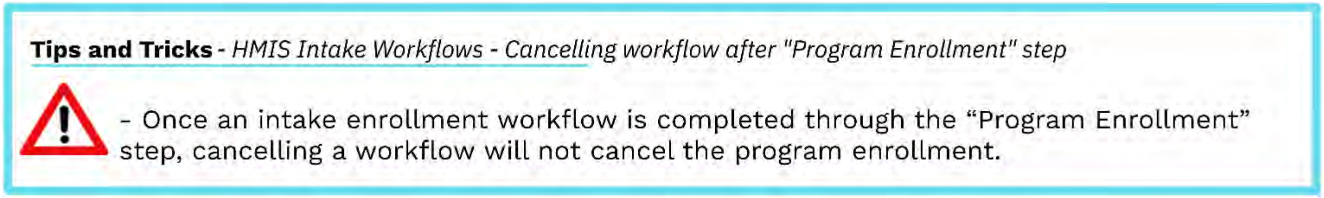
	Description	Workflow	Step	Paused
▶ ⟲ ✕	2024 HMIS Program Data	James, Lebron Bradley	Add or Edit	Sep 9, 2024 2:01 PM

Figure 5-12 – Paused Operations Basic Page Anatomy

Step 5: Complete the workflow*.

**For instructions on how to navigate 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”.*

Steps to Cancel a Paused Workflow



Tips and Tricks - *HMIS Intake Workflows - Cancelling workflow after "Program Enrollment" step*

⚠ - Once an intake enrollment workflow is completed through the "Program Enrollment" step, cancelling a workflow will not cancel the program enrollment.

Figure 5-13 – Tips and Tricks – Cancelling Workflow After "Program Enrollment" Step

Paused operations prior to completing the "Program Enrollment" step* in the intake workflow** can be cancelled.

**To cancel a workflow after the "Program Enrollment" step is completed, please reach out to hmis@changinghomelessness.org to have the workflow and enrollment cancelled.*

***For information on ClientTrack Workflows, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows in the "HMIS Basic User 2025 Manual".*

Step 1: Navigate to the Home 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 "My ClientTrack" secondary sidebar* menu option. A dropdown menu will appear under the "My ClientTrack" folder.

**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".*

Step 3: Under the "My ClientTrack" folder dropdown menu, select the "Paused Operations" subfolder.

Step 4: Select the cancel icon* next to the appropriate paused workflow.

**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".*

Editing Completed Enrollment Workflows (Entry/Exit)

To edit an enrollment workflow, you can do so by using the "Edit '_____' Workflow" action built into ClientTrack.

Steps to Edit an Entry/Exit Workflow

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".*

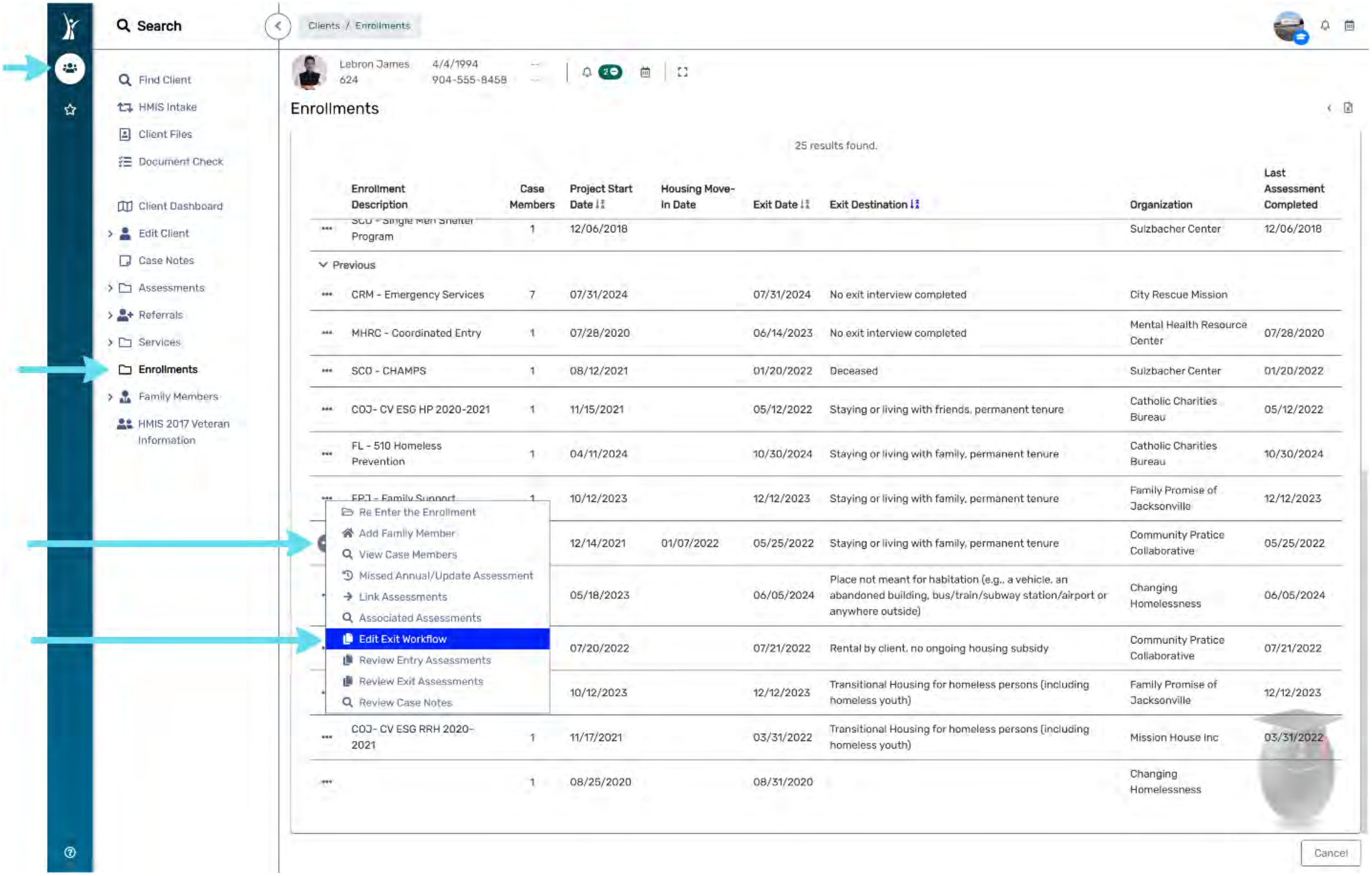
Step 3: Click the action button* next to the appropriate enrollment.

For an existing enrollment, select, “Edit Entry Workflow”**.

For an exited enrollment, select, “Edit Exit Workflow”**.

** 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”.*

*** ClientTrack will navigate to the previously completed Entry/Exit Workflow, including any assessments required at the program entry/exit.*



Enrollments

25 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
SCO - Single Men Shelter Program	1	12/06/2018				Sulzbacher Center	12/06/2018
Previous							
CRM - Emergency Services	7	07/31/2024		07/31/2024	No exit interview completed	City Rescue Mission	
MHRC - Coordinated Entry	1	07/28/2020		06/14/2023	No exit interview completed	Mental Health Resource Center	07/28/2020
SCO - CHAMPS	1	08/12/2021		01/20/2022	Deceased	Sulzbacher Center	01/20/2022
COJ- CV ESG HP 2020-2021	1	11/15/2021		05/12/2022	Staying or living with friends, permanent tenure	Catholic Charities Bureau	05/12/2022
FL - 510 Homeless Prevention	1	04/11/2024		10/30/2024	Staying or living with family, permanent tenure	Catholic Charities Bureau	10/30/2024
FPJ - Family Support	1	10/12/2023		12/12/2023	Staying or living with family, permanent tenure	Family Promise of Jacksonville	12/12/2023
		12/14/2021	01/07/2022	05/25/2022	Staying or living with family, permanent tenure	Community Pratice Collaborative	05/25/2022
		05/18/2023		06/05/2024	Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)	Changing Homelessness	06/05/2024
		07/20/2022		07/21/2022	Rental by client, no ongoing housing subsidy	Community Pratice Collaborative	07/21/2022
		10/12/2023		12/12/2023	Transitional Housing for homeless persons (including homeless youth)	Family Promise of Jacksonville	12/12/2023
COJ- CV ESG RRH 2020-2021	1	11/17/2021		03/31/2022	Transitional Housing for homeless persons (including homeless youth)	Mission House Inc	03/31/2022
	1	08/25/2020		08/31/2020		Changing Homelessness	

Figure 5-14 – Edit Workflows – Editing Exit Workflow

Step 4: Navigate through the workflow* and make changes as applicable**

** For information and instructions on navigating through a workflow, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows/Navigating through a Workflow in the "HMIS Basic User 2025 Manual".*

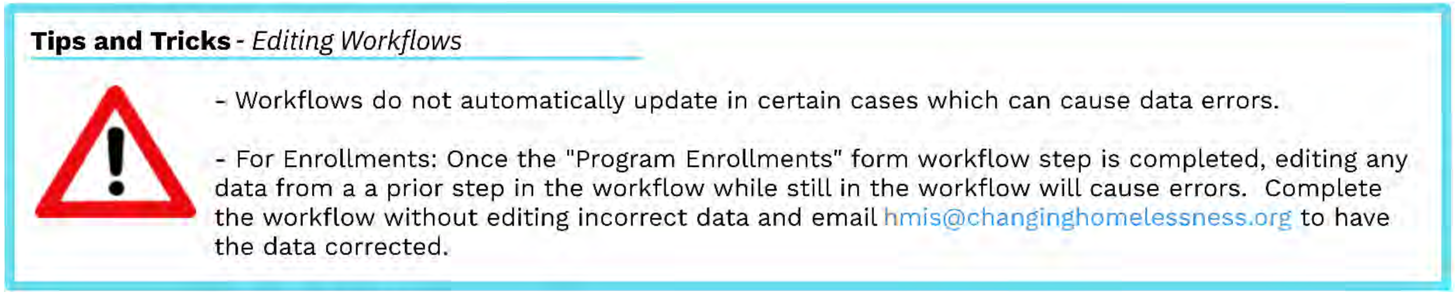
*** Going through the "Edit Workflow" will replace the data captured in the previous workflow.*

Editing an Existing Enrollment

Workflow data may need to be updated or changed after a completed program enrollment* workflow. This section will cover the basics of editing specific types of information after an enrollment workflow has already been completed** for a currently open enrollment.

** Client Enrollments: To learn how to navigate to the "Enrollments" folder, see Chapter 3: Home Workspace Menu Options, Folders, and Subfolders/Enrollments: Folder in the "HMIS Basic User 2025 Manual".*

*** For information on ClientTrack Workflows, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows in the "HMIS Basic User 2025 Manual".*



Tips and Tricks - *Editing Workflows*

- Workflows do not automatically update in certain cases which can cause data errors.

- For Enrollments: Once the "Program Enrollments" form workflow step is completed, editing any data from a a prior step in the workflow while still in the workflow will cause errors. Complete the workflow without editing incorrect data and email hmis@changinghomelessness.org to have the data corrected.

Figure 5-15 - – Tips and Tricks – Editing Workflows

Editing an Existing Enrollment: Adding a Housing Move in Date

Steps to Adding a Housing Move in Date

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".***

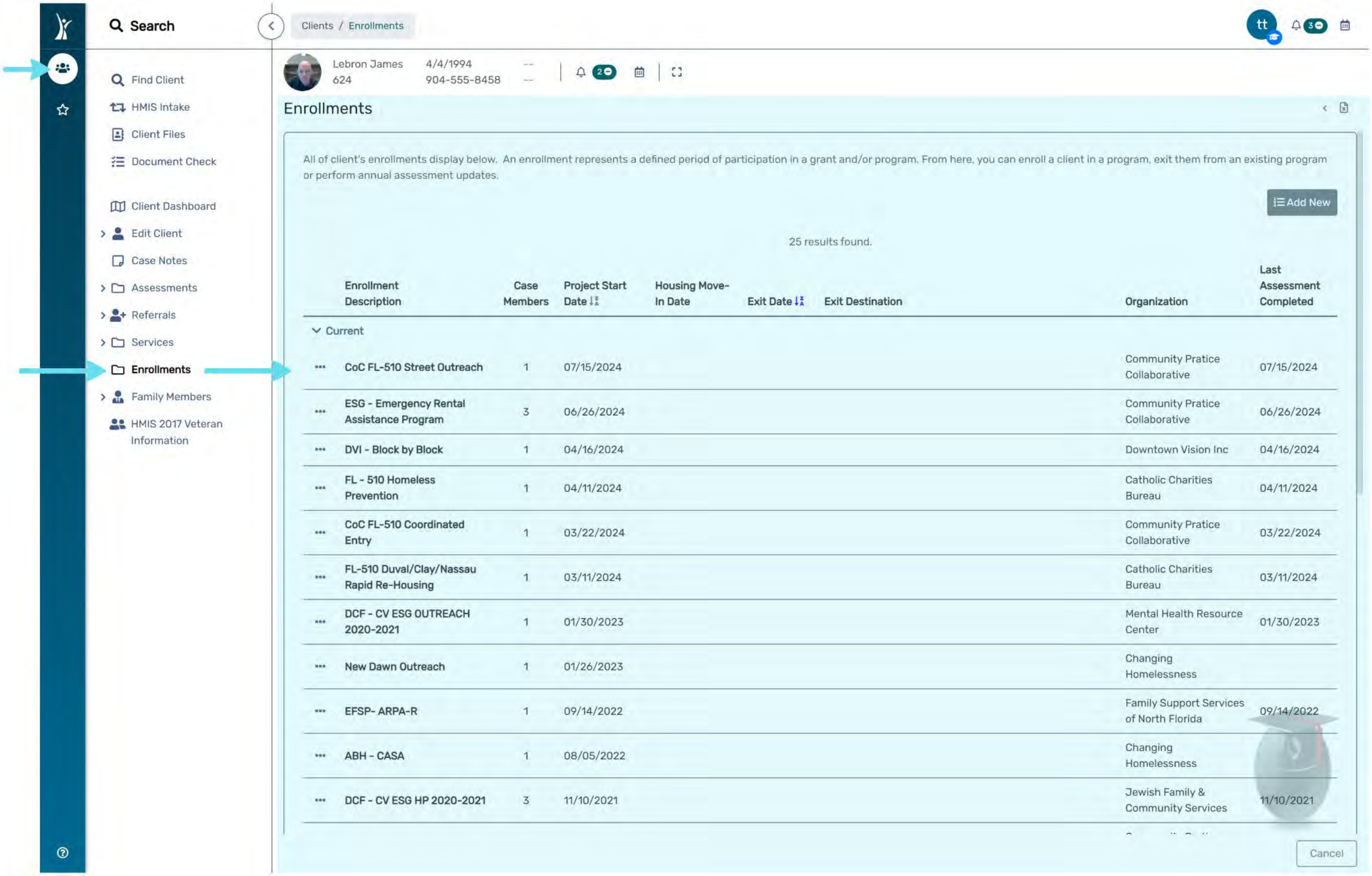
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".*

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

Enrollments

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 existing program or perform annual assessment updates.

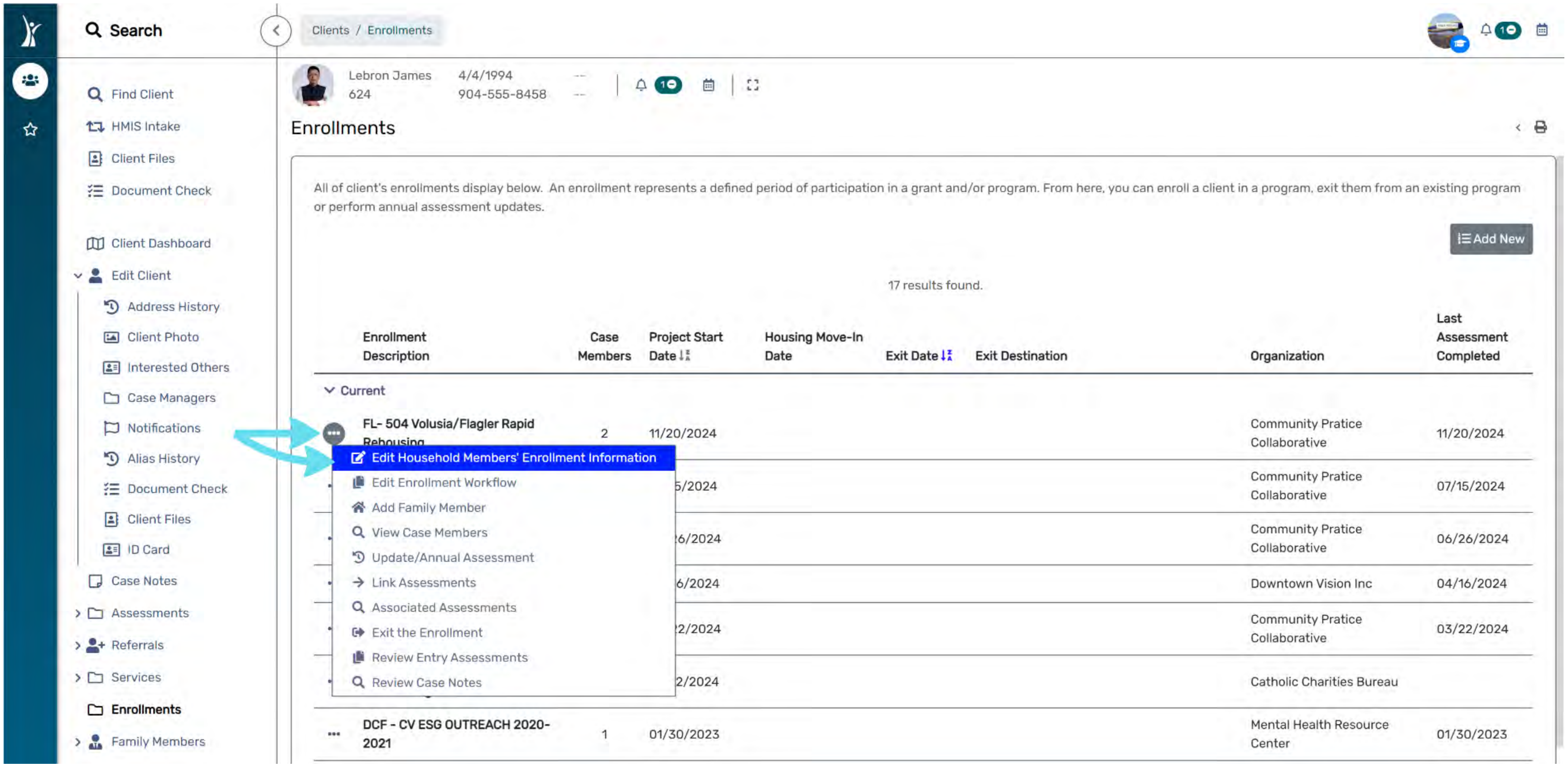
25 results found.

	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	1	07/15/2024				Community Pratice Collaborative	07/15/2024
•••	ESG - Emergency Rental Assistance Program	3	06/26/2024				Community Pratice 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 Pratice 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	
•••	DCF - CV ESG HP 2020-2021	3	11/10/2021				Jewish Family & Community Services	11/10/2021

Figure 5-16 - Navigating to Enrollments Folder

Step 3: Select the action button next to the appropriate enrollment. Select "Edit Household Members' Enrollment Information."

**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".*



Lebron James 624

4/4/1994 904-555-8458

Enrollments

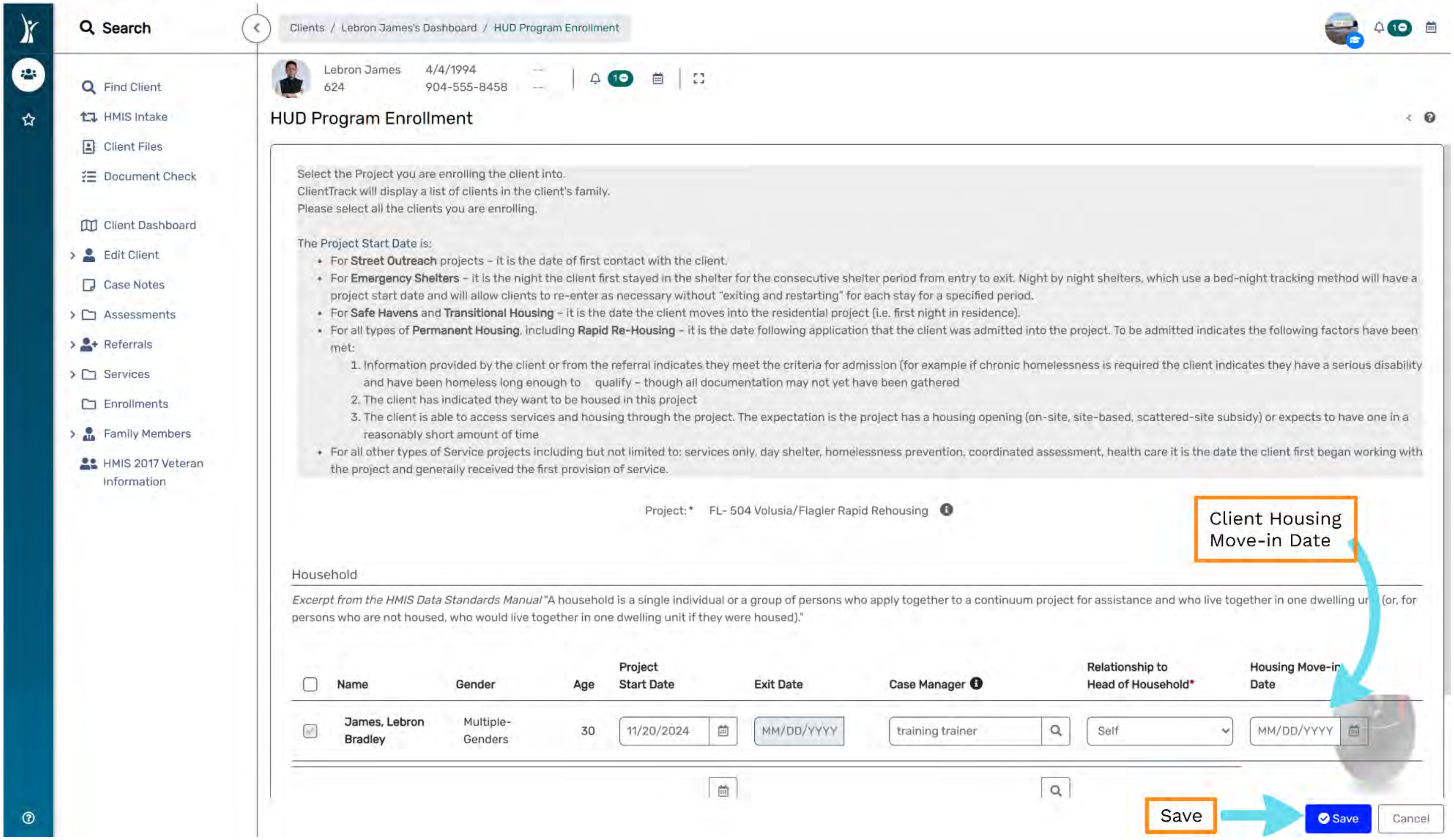
All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment updates.

17 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
Current							
FL- 504 Volusia/Flagler Rapid Rehousing	2	11/20/2024				Community Pratice Collaborative	11/20/2024
		5/2024				Community Pratice Collaborative	07/15/2024
		6/2024				Community Pratice Collaborative	06/26/2024
		6/2024				Downtown Vision Inc	04/16/2024
		2/2024				Community Pratice Collaborative	03/22/2024
		2/2024				Catholic Charities Bureau	
DCF - CV ESG OUTREACH 2020-2021	1	01/30/2023				Mental Health Resource Center	01/30/2023

Figure 5-17 – Edit Household Members' Enrollment Information

Step 4: Enter the Client’s housing move-in date into the Housing Movie-in date box. Click “Save” to save changes. Click “Cancel” to exit without saving. ClientTrack will navigate to the “Enrollments” workspace container.



HUD Program Enrollment

Select the Project you are enrolling the client into.
ClientTrack will display a list of clients in the client's family.
Please select all the clients you are enrolling.

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: * FL- 504 Volusia/Flagler Rapid Rehousing

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 ur (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

☐	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*	Housing Move-in Date
☑	James, Lebron Bradley	Multiple-Genders	30	11/20/2024	MM/DD/YYYY	training trainer	Self	MM/DD/YYYY

Client Housing Move-in Date

Save

Figure 5-18 – Entering and Recording Client Housing Move-In Date

Editing an Existing Enrollment: Managing Family Members

Editing an Existing Enrollment: Adding A Family Member

Steps to Adding a Family Member to an Existing Enrollment

There are many ways to add a family member to enrollments that can cause data errors. The steps in this section will ensure that all the data associated with this program enrollment is captured and updated correctly.

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".*

Step 3: Select the action button* next to the appropriate enrollment. Select "Add Family Member." ClientTrack will re-open the enrollment Family Members workflow** step.

** 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".*

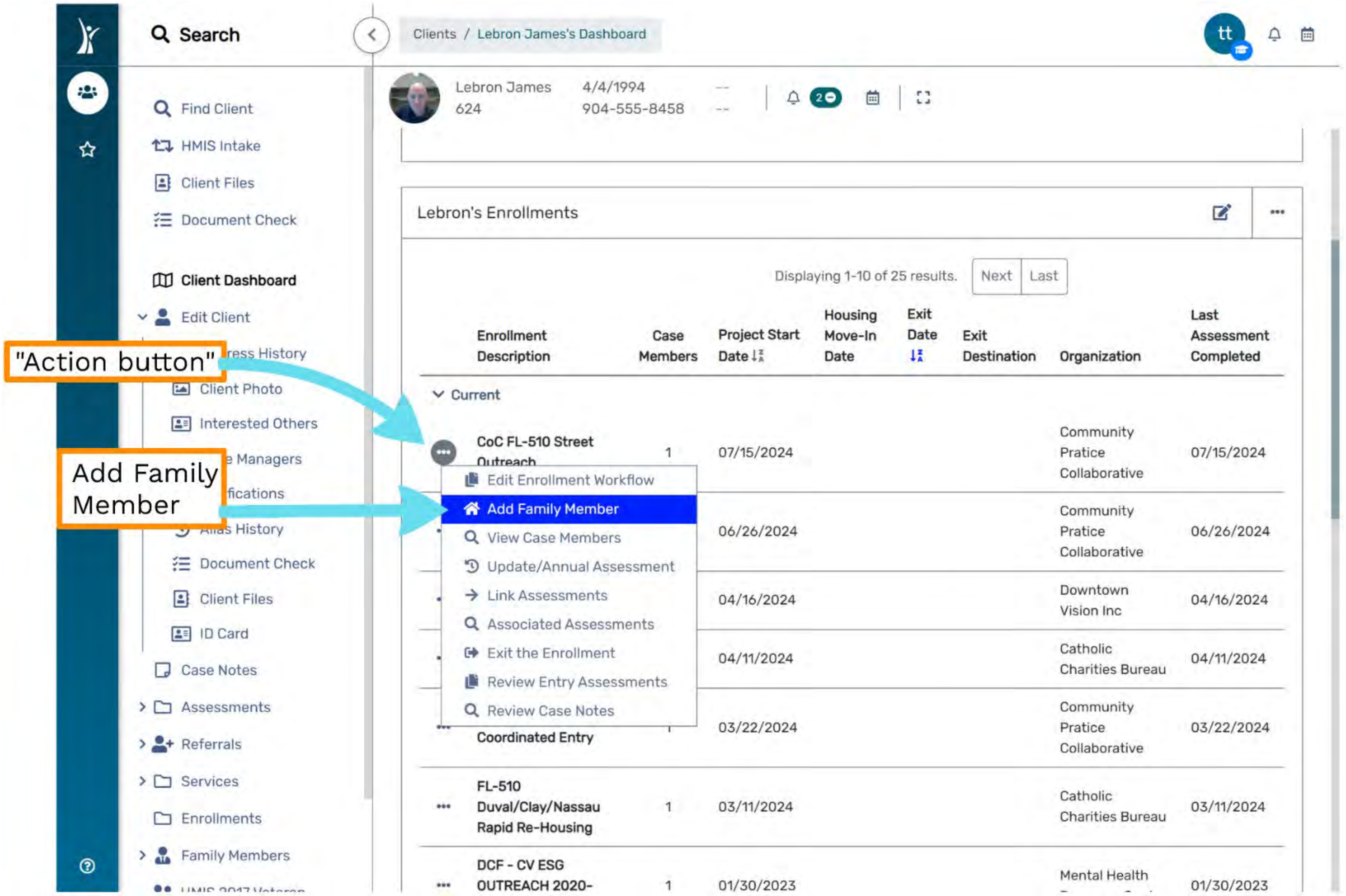
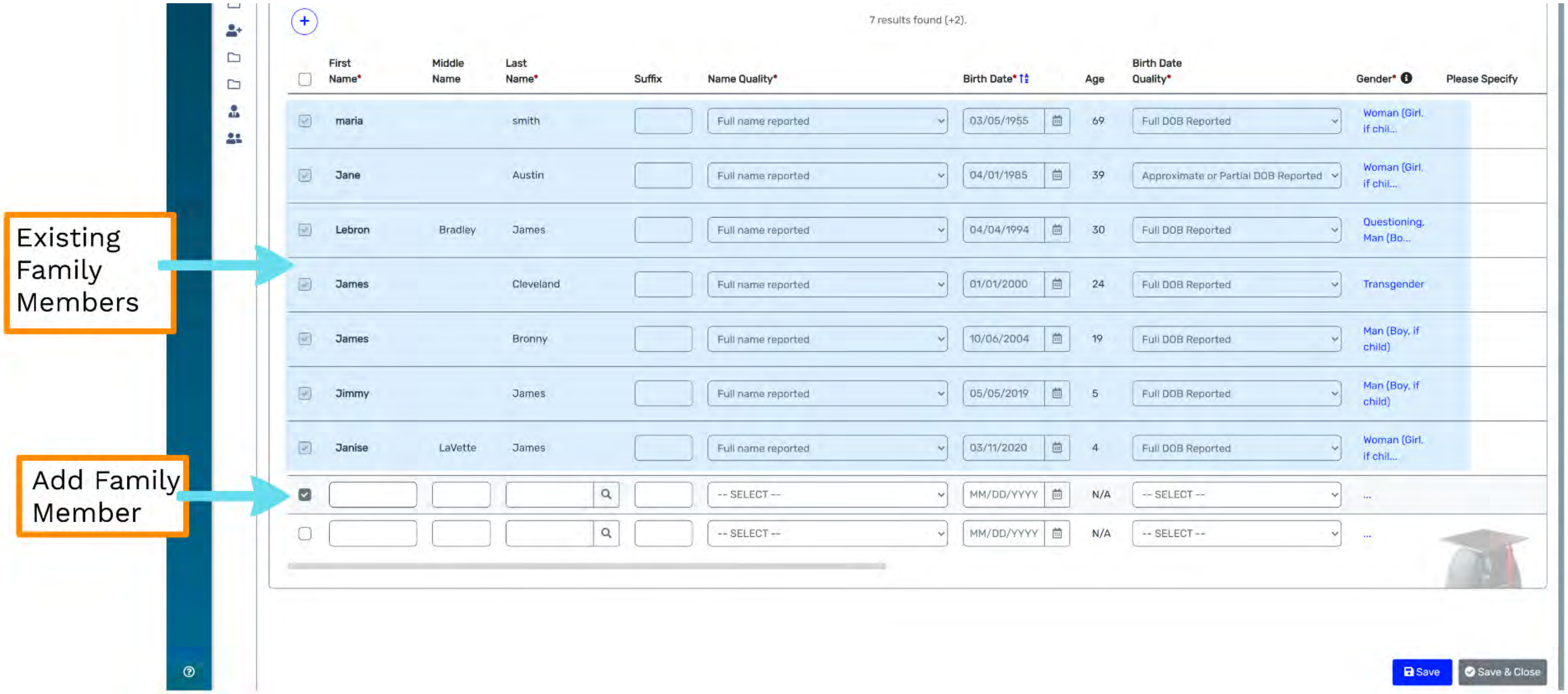


Figure 5-19 – Editing Enrollments – Adding Family Member Navigation

Step 4: If adding an existing family member(s) to an existing enrollment, update any information if applicable and click the “Save and Close” button. Skip step 5 and continue to step 6.

If adding a new family member to an existing enrollment, click the checkbox next to the last row, and add or update the applicable information for the added family member(s).



7 results found (+2).

☐	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date*	Age	Birth Date Quality*	Gender*	Please Specify
☑	maria		smith		Full name reported	03/05/1955	69	Full DOB Reported	Woman (Girl, if chil...	
☑	Jane		Austin		Full name reported	04/01/1985	39	Approximate or Partial DOB Reported	Woman (Girl, if chil...	
☑	Lebron	Bradley	James		Full name reported	04/04/1994	30	Full DOB Reported	Questioning, Man (Bo...	
☑	James		Cleveland		Full name reported	01/01/2000	24	Full DOB Reported	Transgender	
☑	James		Bronny		Full name reported	10/06/2004	19	Full DOB Reported	Man (Boy, if child)	
☑	Jimmy		James		Full name reported	05/05/2019	5	Full DOB Reported	Man (Boy, if child)	
☑	Janise	LaVette	James		Full name reported	03/11/2020	4	Full DOB Reported	Woman (Girl, if chil...	
☑					-- SELECT --	MM/DD/YYYY	N/A	-- SELECT --	...	
☐					-- SELECT --	MM/DD/YYYY	N/A	-- SELECT --	...	

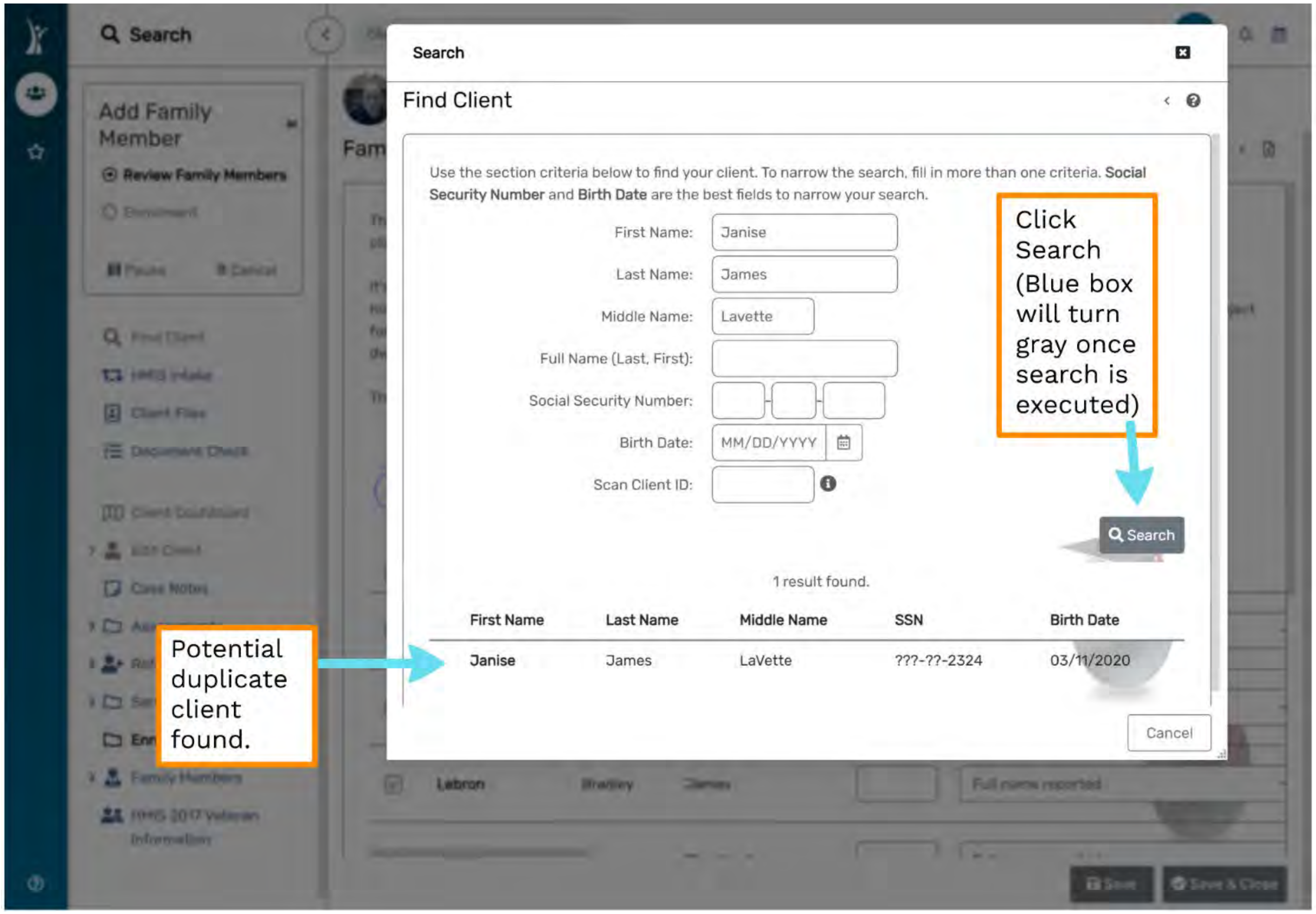
Figure 5-20 – Adding Family Members to Existing Enrollments Workflow Step

Step 5: ClientTrack will prompt you to search the system for possible duplicates*. A search form will pop up. View the names that appear in the results. If there is a match, click on that row.

If a record(s) is found, verify if the potential client record is or isn't the client currently being enrolled. If the record is of the client being enrolled, enroll the client from the existing record.

If no records are found, click cancel. This will return you to the Family Members page. Complete the remaining applicable fields for the new family member.

**For instructions on best practices for using the "Find Client" folder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Best Practices to Search for Clients in HMIS*



Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name: Janise
Last Name: James
Middle Name: Lavette
Full Name (Last, First):
Social Security Number:
Birth Date: MM/DD/YYYY
Scan Client ID:

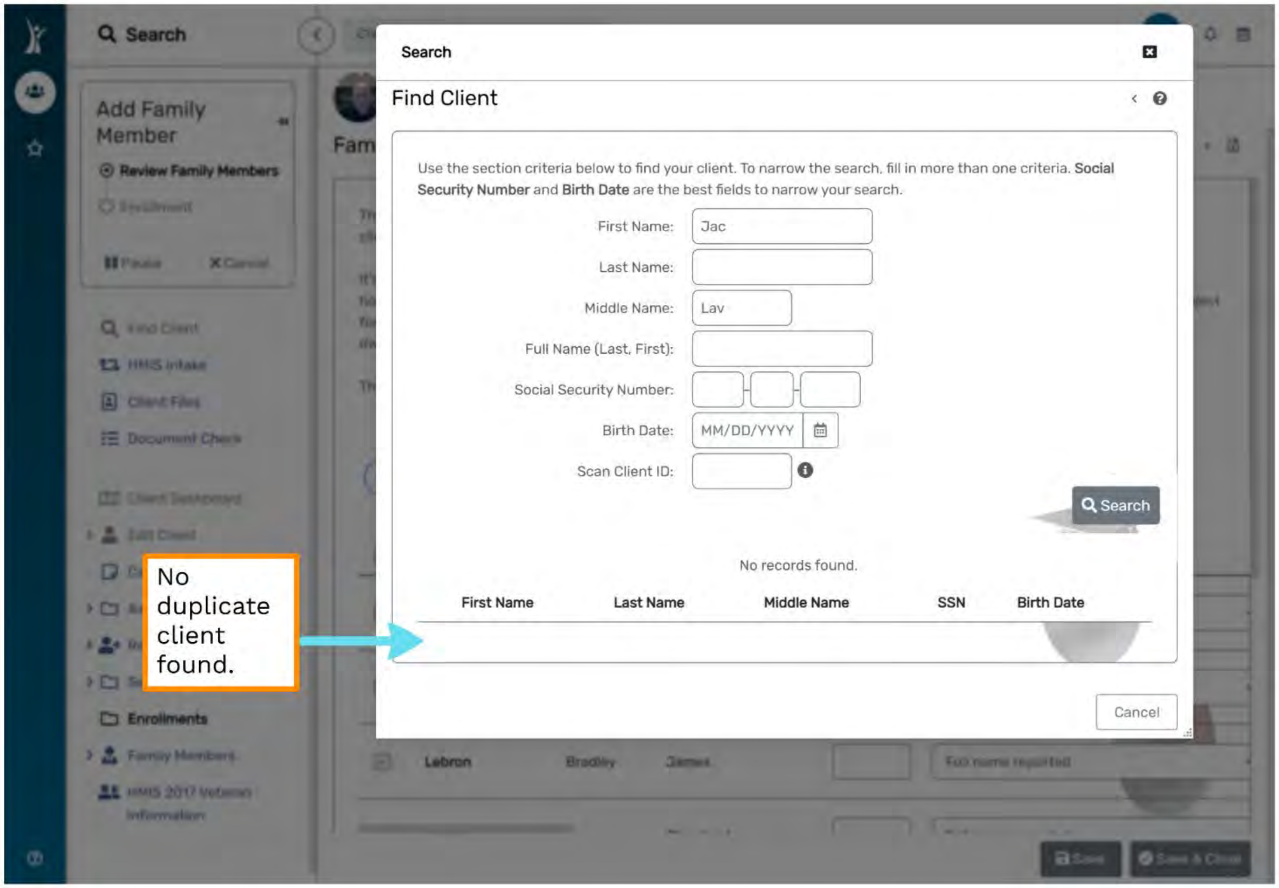
1 result found.

First Name	Last Name	Middle Name	SSN	Birth Date
Janise	James	LaVette	???-??-2324	03/11/2020

Click Search (Blue box will turn gray once search is executed)

Potential duplicate client found.

Figure 5-21 – Adding Family Member – Search for Potential Duplicate Entry



Search

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name: Jac

Last Name:

Middle Name: Lav

Full Name (Last, First):

Social Security Number:

Birth Date: MM/DD/YYYY

Scan Client ID:

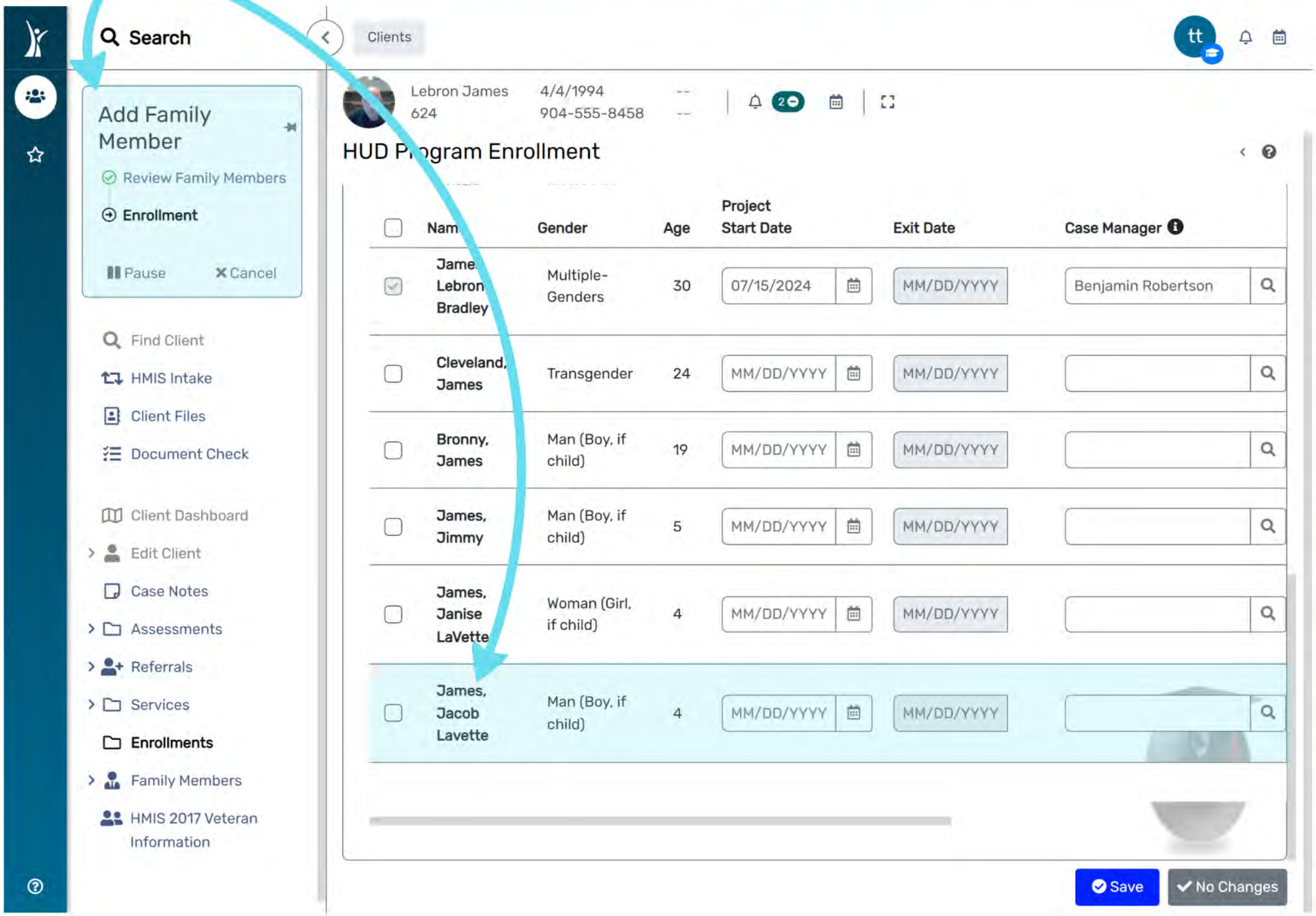
No records found.

First Name	Last Name	Middle Name	SSN	Birth Date

Figure 5-22 – Adding Family Member – No Duplicate Found

The Existing Enrollment Workflow will be updated; 1. The “Workflow Navigation Pane” and 2. The HUD Program Enrollment workspace container.

1. The Workflow Navigation Pane "Add Family Member" workflow step which connects to the Intake/Enrollment Workflow)
2. The new family member will be listed on the "HUD Program Enrollment" page



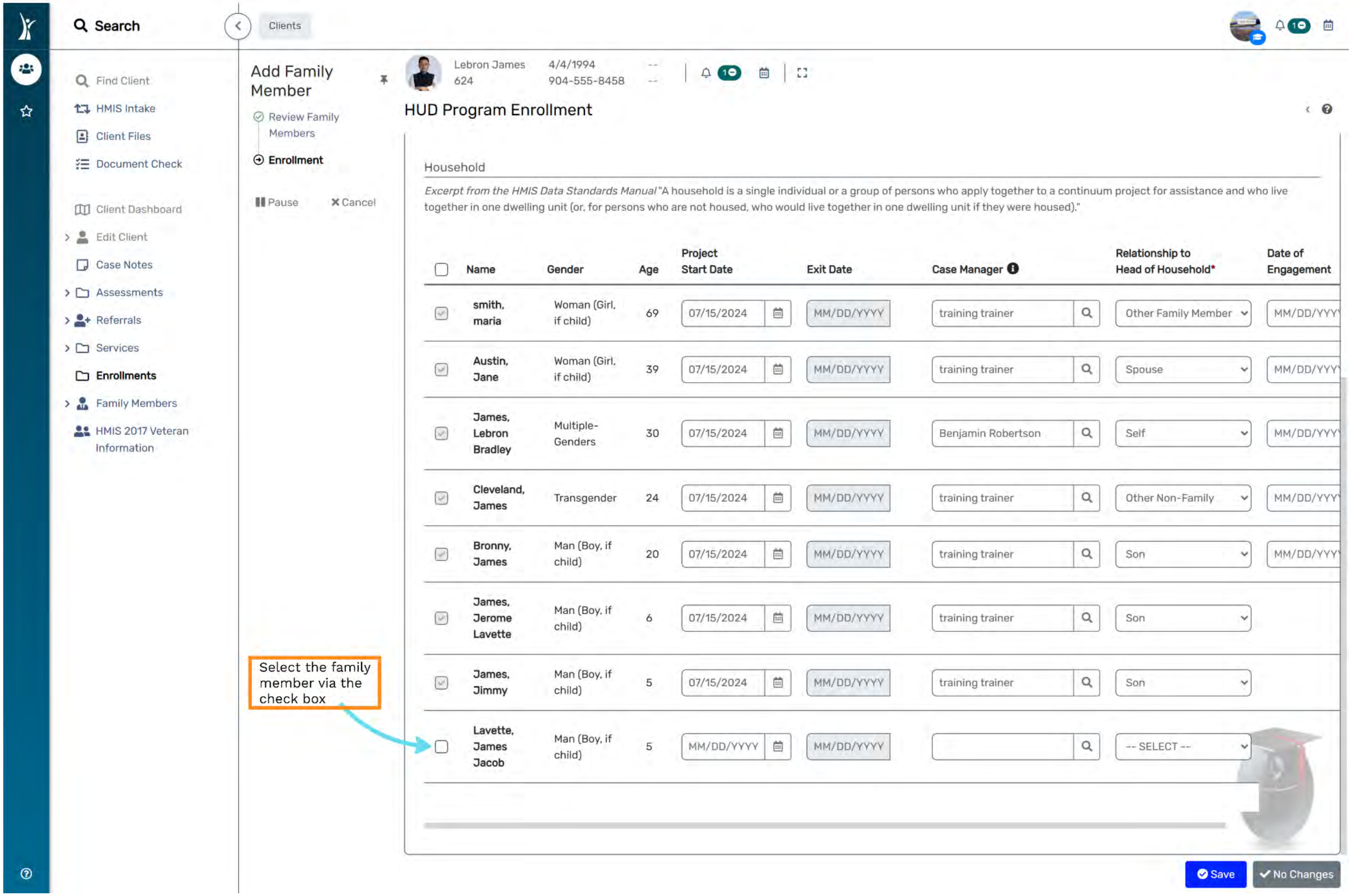
Lebron James 624
4/4/1994 904-555-8458
-- --

HUD Program Enrollment

☐	Name	Gender	Age	Project Start Date	Exit Date	Case Manager
☑	Jame Lebron Bradley	Multiple-Genders	30	07/15/2024	MM/DD/YYYY	Benjamin Robertson
☐	Cleveland, James	Transgender	24	MM/DD/YYYY	MM/DD/YYYY	
☐	Bronny, James	Man (Boy, if child)	19	MM/DD/YYYY	MM/DD/YYYY	
☐	James, Jimmy	Man (Boy, if child)	5	MM/DD/YYYY	MM/DD/YYYY	
☐	James, Janise LaVette	Woman (Girl, if child)	4	MM/DD/YYYY	MM/DD/YYYY	
☐	James, Jacob Lavette	Man (Boy, if child)	4	MM/DD/YYYY	MM/DD/YYYY	

Figure 5-23 – Adding Family Members to Existing Enrollments – Two Areas of Update

Step 6: Because the family member is being added through the head of household’s enrollment, that enrollment is auto selected and not able to be edited. Via the checkbox, select next to the applicable client to enroll the client in the program. Click “Save”.



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

HUD Program Enrollment

Household

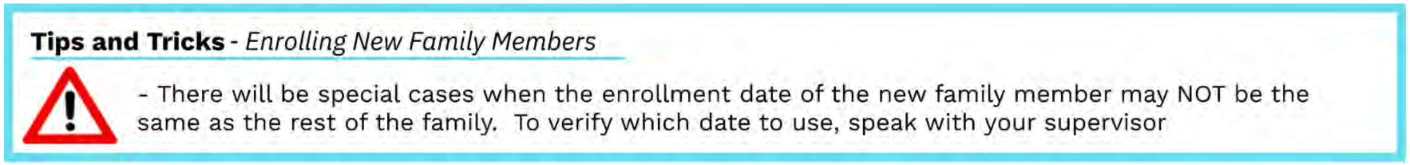
Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

☐	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*	Date of Engagement
☑	smith, maria	Woman (Girl, if child)	69	07/15/2024	MM/DD/YYYY	training trainer	Other Family Member	MM/DD/YYY
☑	Austin, Jane	Woman (Girl, if child)	39	07/15/2024	MM/DD/YYYY	training trainer	Spouse	MM/DD/YYY
☑	James, Lebron Bradley	Multiple-Genders	30	07/15/2024	MM/DD/YYYY	Benjamin Robertson	Self	MM/DD/YYY
☑	Cleveland, James	Transgender	24	07/15/2024	MM/DD/YYYY	training trainer	Other Non-Family	MM/DD/YYY
☑	Bronny, James	Man (Boy, if child)	20	07/15/2024	MM/DD/YYYY	training trainer	Son	MM/DD/YYY
☑	James, Jerome Lavette	Man (Boy, if child)	6	07/15/2024	MM/DD/YYYY	training trainer	Son	
☑	James, Jimmy	Man (Boy, if child)	5	07/15/2024	MM/DD/YYYY	training trainer	Son	
☐	Lavette, James Jacob	Man (Boy, if child)	5	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --	

Select the family member via the check box

Figure 5-24 – Adding Clients to Existing Enrollments – Select and Save

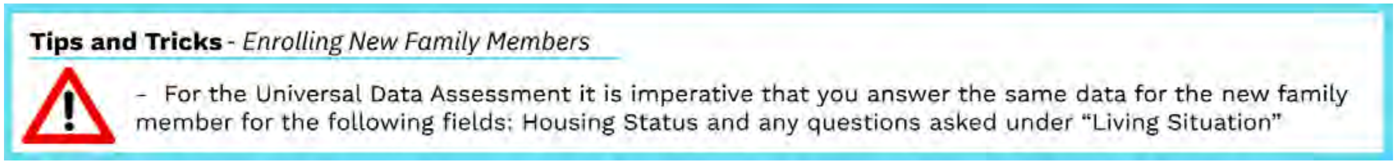
Step 7: Complete any additional workflow steps if applicable. Click the finish button to close the enrollment. ClientTrack will navigate to the "Enrollments" workspace container. The number in the column for the applicable updated enrollment will reflect the number of total family members.



Tips and Tricks - *Enrolling New Family Members*

- There will be special cases when the enrollment date of the new family member may NOT be the same as the rest of the family. To verify which date to use, speak with your supervisor

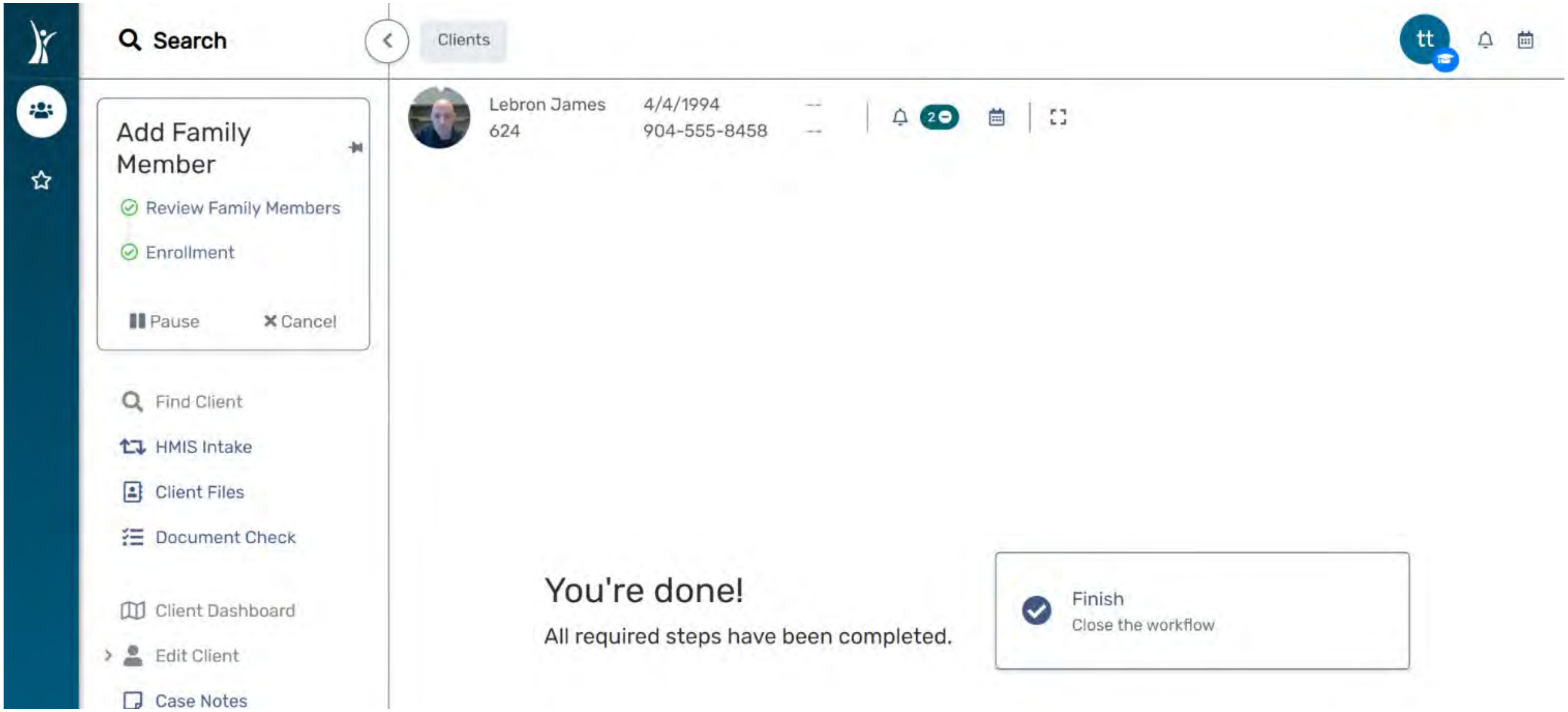
Figure 5-25 – Tips and Tricks – Enrolling New Family Members 1



Tips and Tricks - *Enrolling New Family Members*

- For the Universal Data Assessment it is imperative that you answer the same data for the new family member for the following fields: Housing Status and any questions asked under "Living Situation"

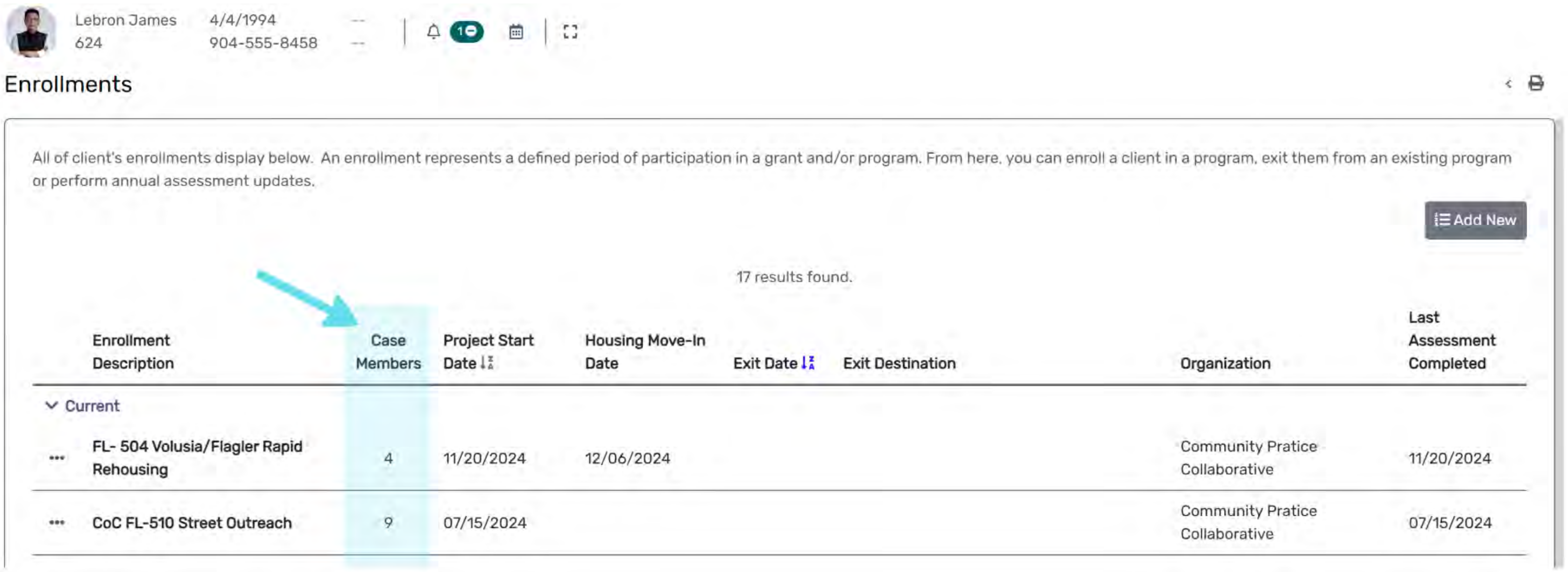
Figure 5-26 – Tips and Tricks – Enrolling New Family Members 2



You're done!

All required steps have been completed.

Figure 5-27 – Adding a Family Member to an Existing Enrollment – Finish



Enrollments

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 existing program or perform annual assessment updates.

17 results found.

	Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
Current								
•••	FL- 504 Volusia/Flagler Rapid Rehousing	4	11/20/2024	12/06/2024			Community Pratice Collaborative	11/20/2024
•••	CoC FL-510 Street Outreach	9	07/15/2024				Community Pratice Collaborative	07/15/2024

Figure 5-28 – Editing an Existing Enrollment – Adding Additional Family Members – Updated Case Members

Editing an Existing Enrollment: Remove a Family Member

If, during* an enrollment, a household’s family member(s) status changes and the family member is no longer participating/eligible in a program, the family member(s) is to be exited from the program enrollment.

**If a family member(s) was enrolled incorrectly, please reach out to a supervisor and contact the HMIS team by email at hmis@changinghomelessness.org or by sending an Issue Ticket* for assistance to get assistance on editing/correcting the enrollment.*

**For instructions on how to submit an issue through ClientTrack, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Help Center/How to Submit an Issue Ticket*

Steps to Initiating an Exit Workflow for Non-Head-of-household Family Member(s) – 2 Methods

Method 1 (of 2): Exiting a family member through the Head of Household's Profile

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".*

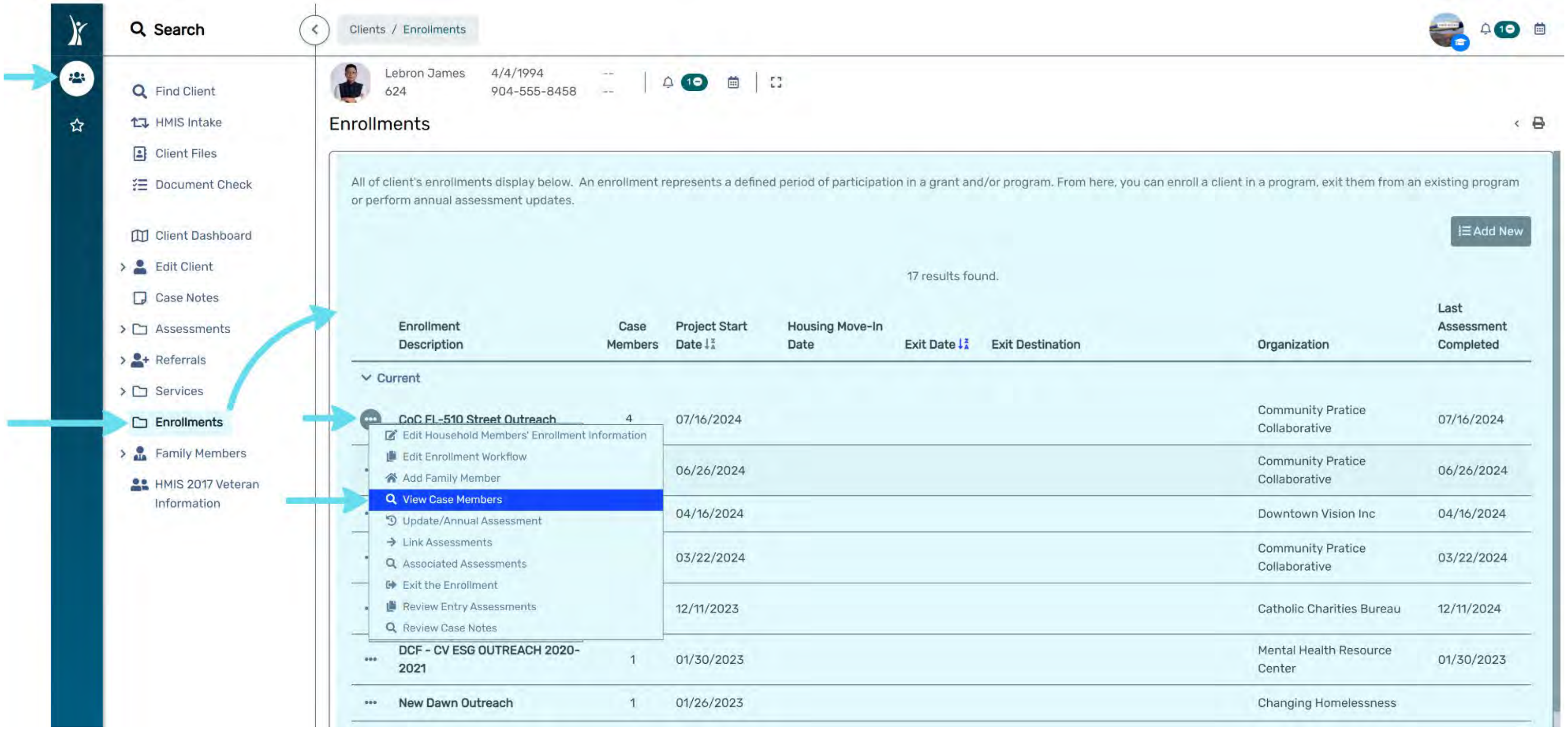
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

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".*

Step 3: Select the action button* next to the appropriate enrollment. Select "View Case Members". ClientTrack will navigate to the "Enrollment Case Members" 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".*



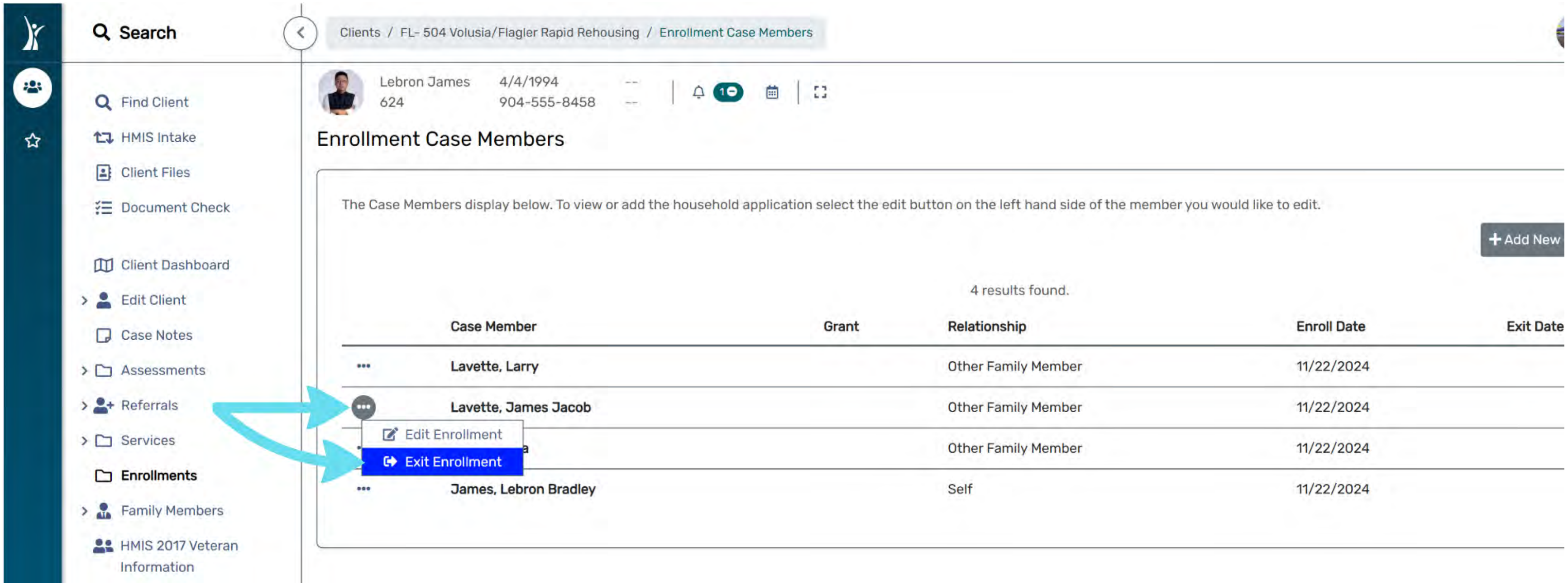
All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment updates.

17 results found.

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	4	07/16/2024				Community Pratice Collaborative	07/16/2024
		06/26/2024				Community Pratice Collaborative	06/26/2024
		04/16/2024				Downtown Vision Inc	04/16/2024
		03/22/2024				Community Pratice Collaborative	03/22/2024
		12/11/2023				Catholic Charities Bureau	12/11/2024
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	

Figure 5-29 - Navigating to Case Members Workspace through Enrollments

Step 4: Select the action button next to the appropriate client. Select "Exit the Enrollment." ClientTrack will navigate to the Enrollment Exit workflow step in the HUD Program Exit workspace container.



Enrollment Case Members

The Case Members display below. To view or add the household application select the edit button on the left hand side of the member you would like to edit.

4 results found.

	Case Member	Grant	Relationship	Enroll Date	Exit Date
•••	Lavette, Larry		Other Family Member	11/22/2024	
•••	Lavette, James Jacob		Other Family Member	11/22/2024	
	a		Other Family Member	11/22/2024	
•••	James, Lebron Bradley		Self	11/22/2024	

Figure 5-30 - Initiating Family Member Exit Enrollment

Step 5: Navigate through the workflow*

*** 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".*

Method 2 (of 2): Exiting a family member through the Family Member's Profile

Step 1: Select the appropriate family member's 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".*

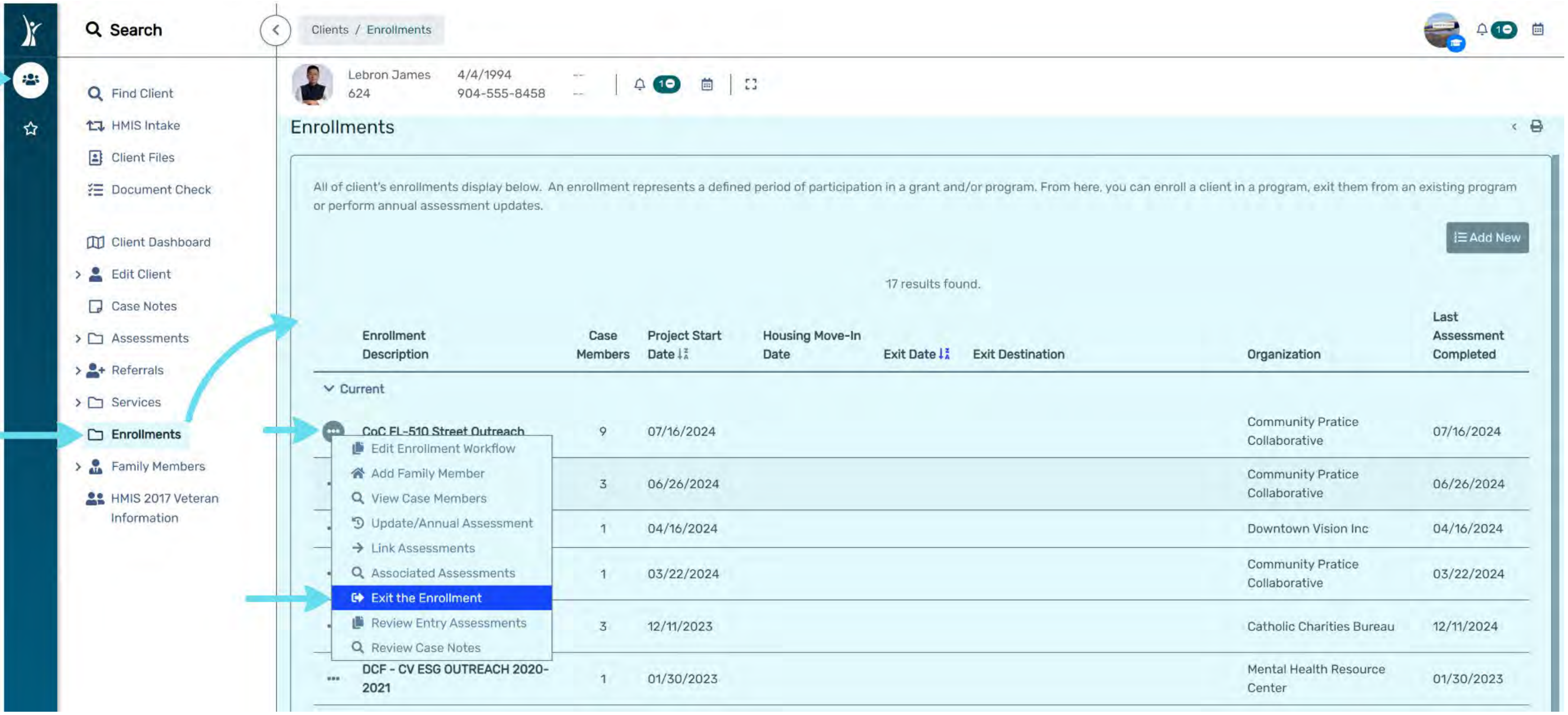
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

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".*

Step 3: Select the action button* next to the appropriate existing enrollment. Select "Exit the Enrollment." ClientTrack will navigate to the Enrollment Exit workflow step in the HUD Program Exit 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".*



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

Enrollments

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 existing program or perform annual assessment updates.

17 results found.

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	9	07/16/2024				Community Pratice Collaborative	07/16/2024
	3	06/26/2024				Community Pratice Collaborative	06/26/2024
	1	04/16/2024				Downtown Vision Inc	04/16/2024
	1	03/22/2024				Community Pratice Collaborative	03/22/2024
	3	12/11/2023				Catholic Charities Bureau	12/11/2024
DCF - CV ESG OUTREACH 2020-2021	1	01/30/2023				Mental Health Resource Center	01/30/2023

Figure 5-31 - Initiating Client Enrollment Exit

Step 4: Navigate through the workflow*

*** 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”.*

Editing Existing Enrollment: Editing Enrollment Dates

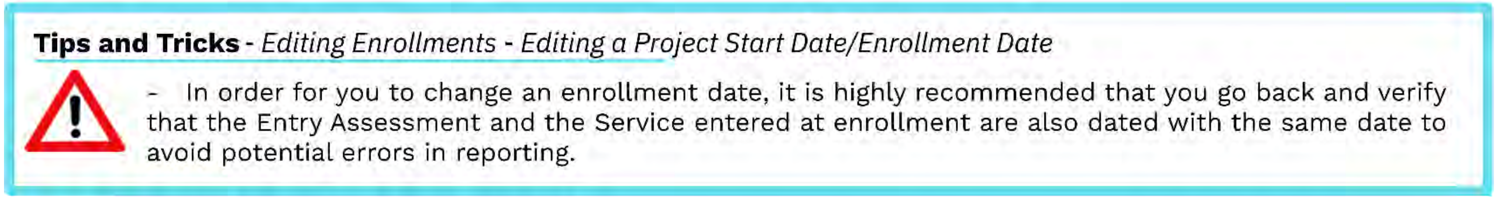
Enrollments are comprised of three components that all need to be dated on the same date to prevent data errors. The Program Enrollment (HUD Program Enrollment Page), the Entry Master Assessment*, and the Service** entered at enrollment.

** 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.

Figure 5-32 – 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".***

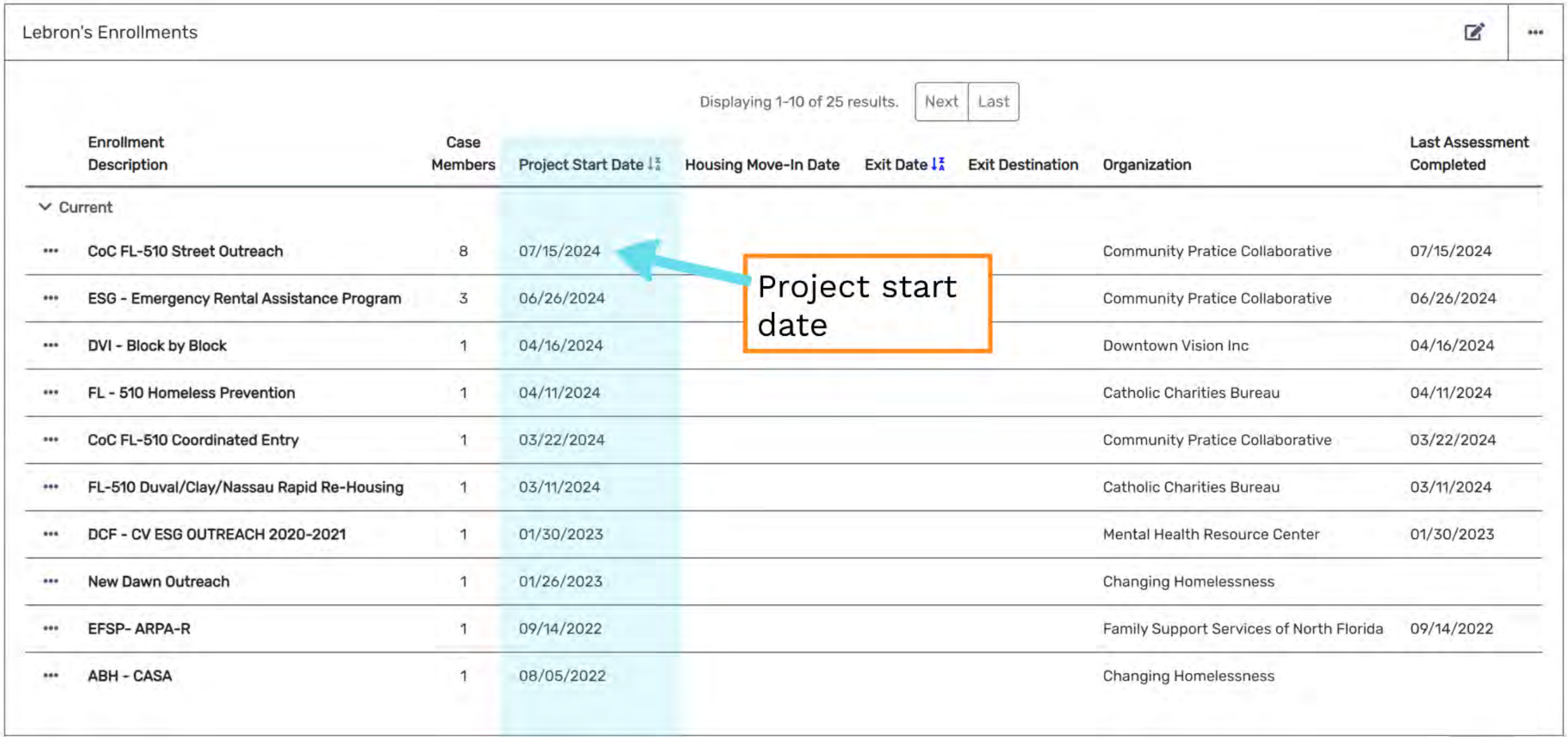
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".*

*** 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

Displaying 1-10 of 25 results.

	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 Pratice Collaborative	07/15/2024
•••	ESG - Emergency Rental Assistance Program	3	06/26/2024				Community Pratice 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 Pratice 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	

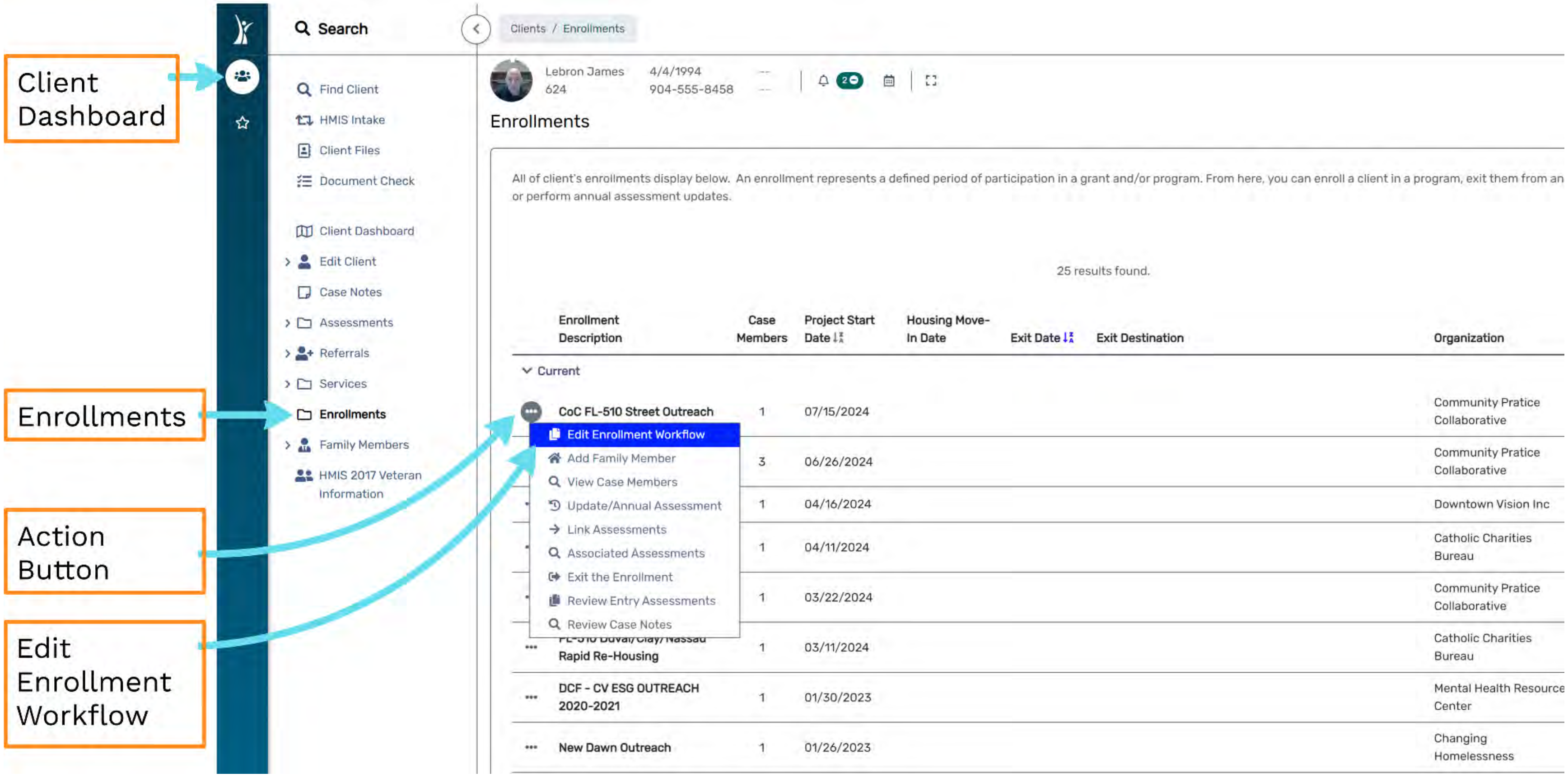
Project start date

Figure 5-33 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".*



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

Enrollments

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
Current						
CoC FL-510 Street Outreach	1	07/15/2024				Community Pratice Collaborative
	3	06/26/2024				Community Pratice Collaborative
	1	04/16/2024				Downtown Vision Inc
	1	04/11/2024				Catholic Charities Bureau
	1	03/22/2024				Community Pratice Collaborative
FL-510 Duval/Clay/Nassau Rapid Re-Housing	1	03/11/2024				Catholic Charities Bureau
DCF - CV ESG OUTREACH 2020-2021	1	01/30/2023				Mental Health Resource Center
New Dawn Outreach	1	01/26/2023				Changing Homelessness

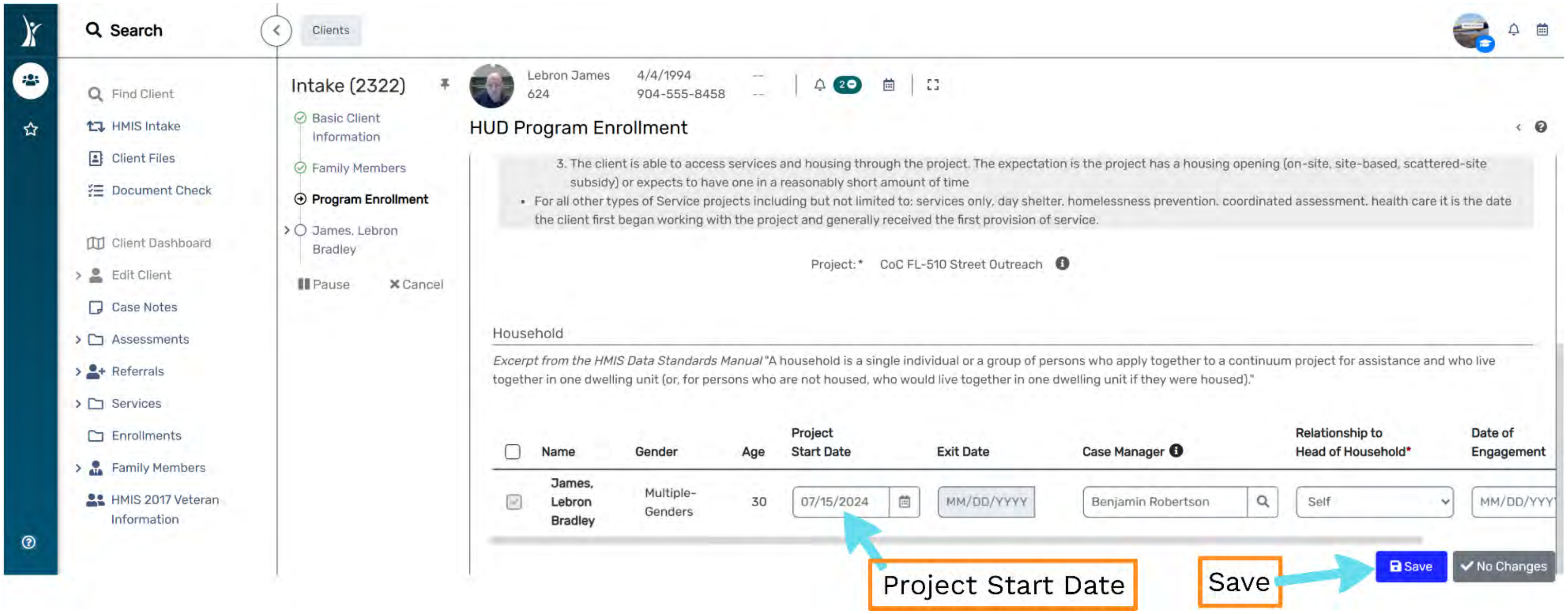
Figure 5-34 – Edit Enrollment Workflow

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.*



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:* CoC FL-510 Street Outreach

Household

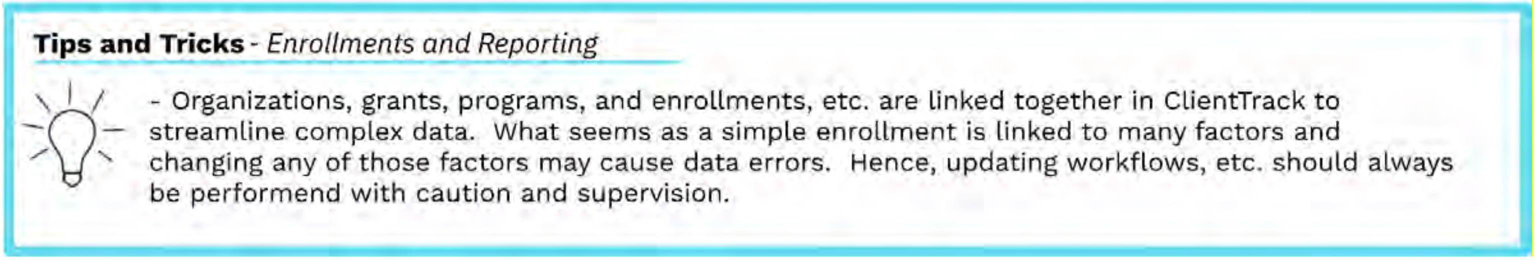
Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

☐	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*	Date of Engagement
☑	James, Lebron Bradley	Multiple-Genders	30	07/15/2024	MM/DD/YYYY	Benjamin Robertson	Self	MM/DD/YYY

Figure 5-35 – 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.



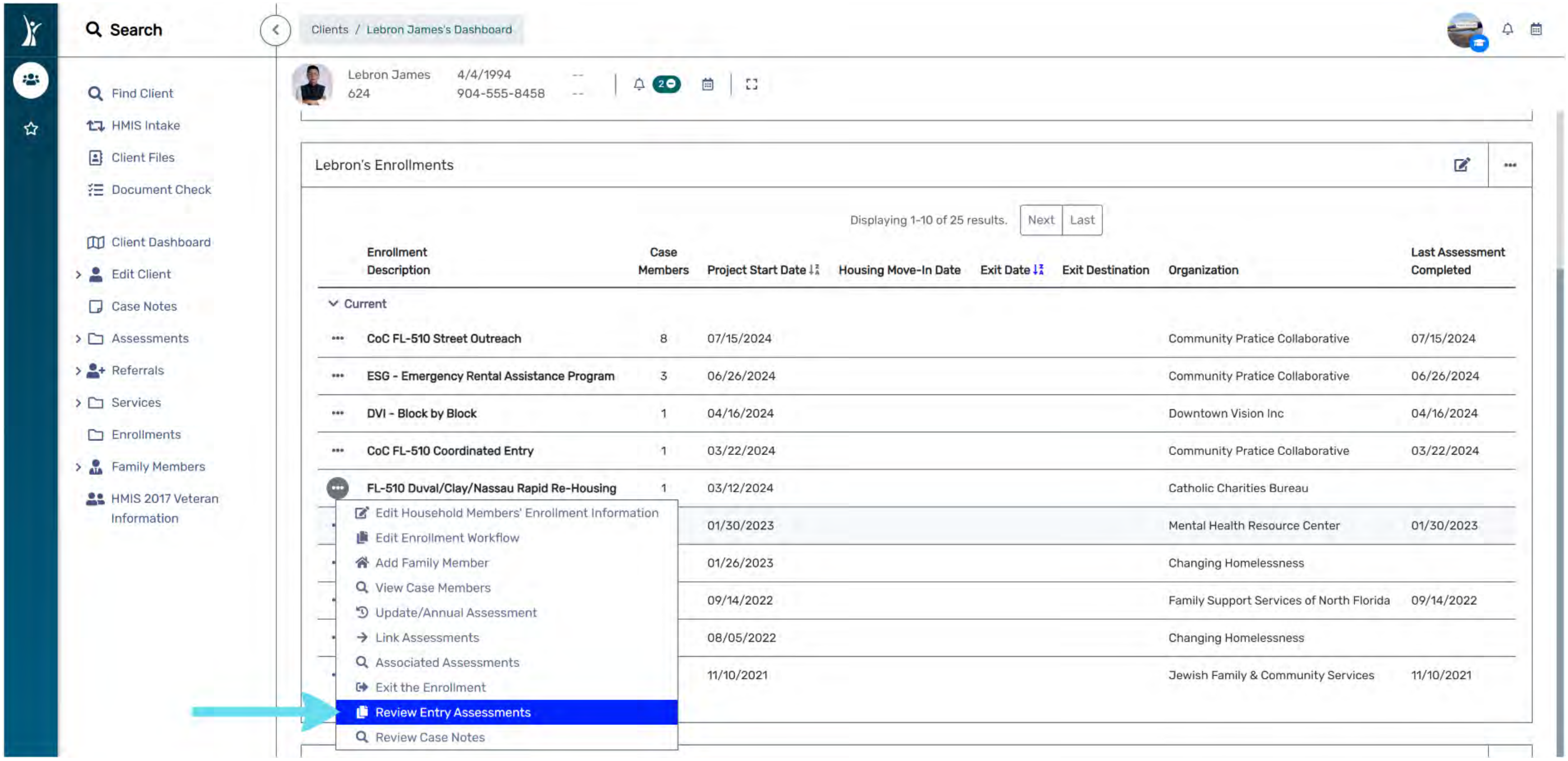
Tips and Tricks - *Enrollments and Reporting*

- 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.

Figure 5-36 – 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".*



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

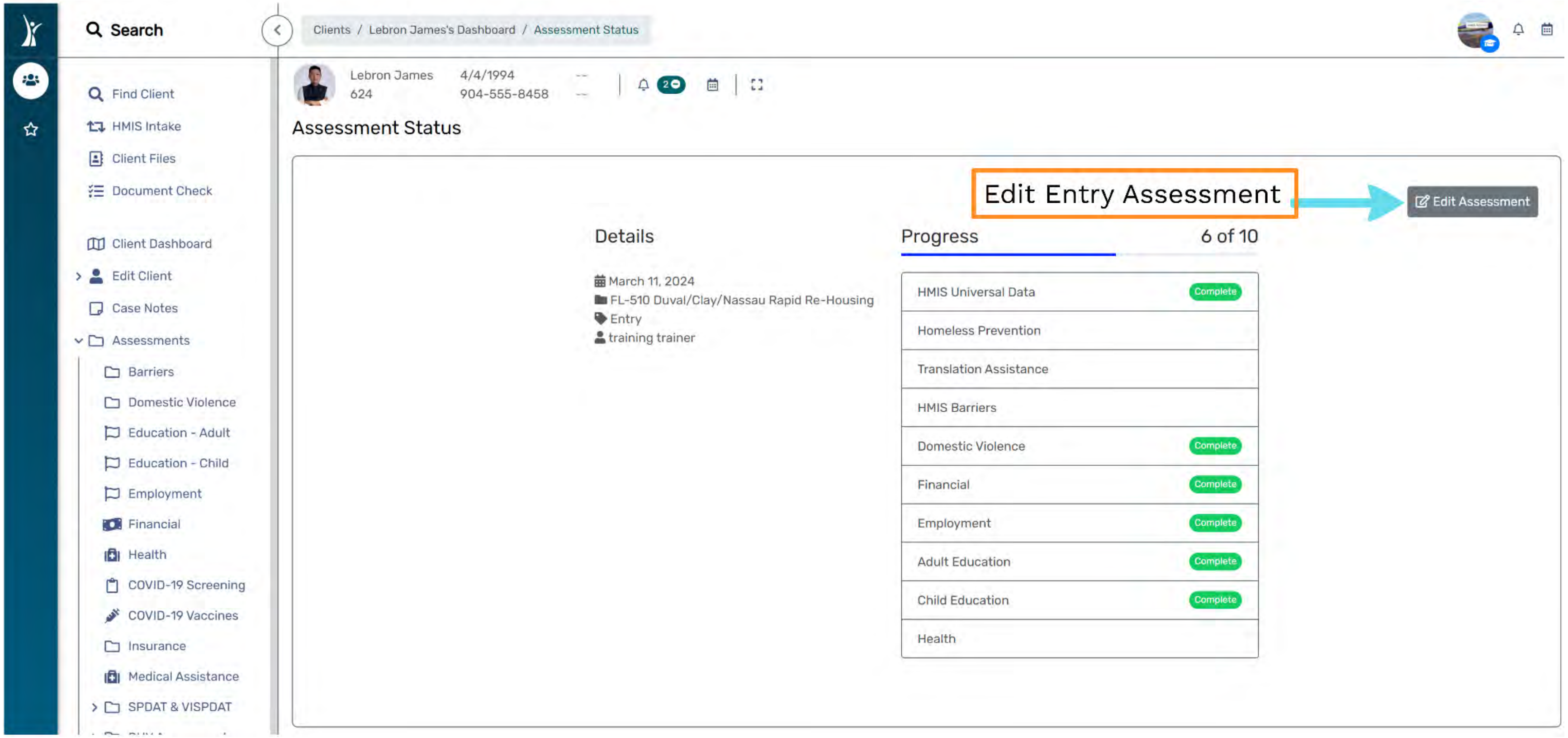
Lebron's Enrollments

Displaying 1-10 of 25 results.

	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 Pratice Collaborative	07/15/2024
•••	ESG - Emergency Rental Assistance Program	3	06/26/2024				Community Pratice Collaborative	06/26/2024
•••	DVI - Block by Block	1	04/16/2024				Downtown Vision Inc	04/16/2024
•••	CoC FL-510 Coordinated Entry	1	03/22/2024				Community Pratice Collaborative	03/22/2024
•••	FL-510 Duval/Clay/Nassau Rapid Re-Housing	1	03/12/2024				Catholic Charities Bureau	
			01/30/2023				Mental Health Resource Center	01/30/2023
			01/26/2023				Changing Homelessness	
			09/14/2022				Family Support Services of North Florida	09/14/2022
			08/05/2022				Changing Homelessness	
			11/10/2021				Jewish Family & Community Services	11/10/2021

Figure 5-37 – Review Entry Assessments

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



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

Assessment Status

Edit Entry Assessment

Details

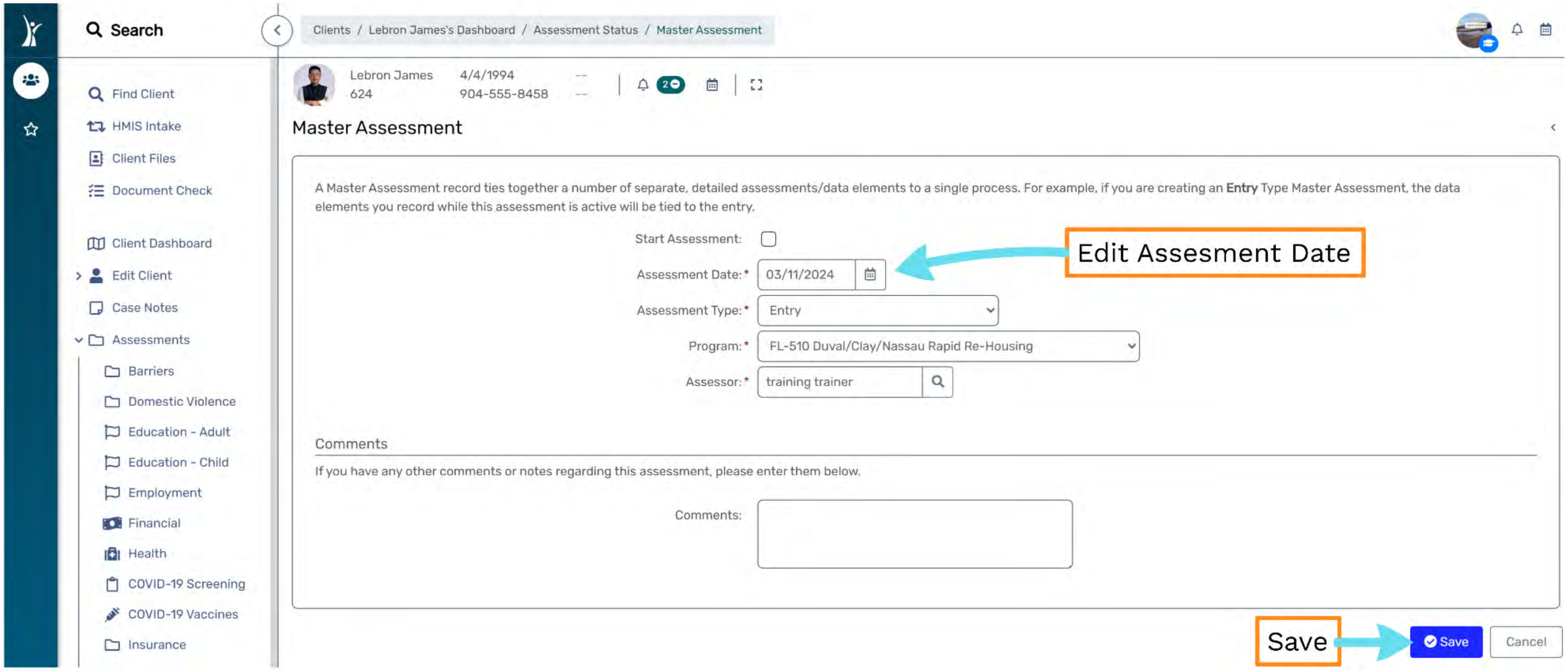
March 11, 2024
FL-510 Duval/Clay/Nassau Rapid Re-Housing
Entry
training trainer

Progress 6 of 10

HMIS Universal Data	Complete
Homeless Prevention	
Translation Assistance	
HMIS Barriers	
Domestic Violence	Complete
Financial	Complete
Employment	Complete
Adult Education	Complete
Child Education	Complete
Health	

Figure 5-38 – 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.



A Master Assessment record ties together a number of separate, detailed assessments/data elements to a single process. For example, if you are creating an **Entry** Type Master Assessment, the data elements you record while this assessment is active will be tied to the entry.

Start Assessment: ☐
Assessment Date:* 03/11/2024
Assessment Type:* Entry
Program:* FL-510 Duval/Clay/Nassau Rapid Re-Housing
Assessor:* training trainer

Comments

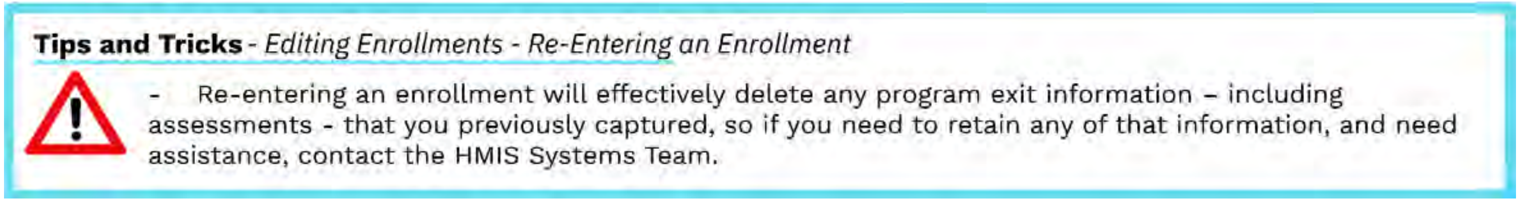
If you have any other comments or notes regarding this assessment, please enter them below.

Comments:

Figure 5-39 – Edit Master Assessment Date

Re Entering Enrollments

A client may need to be reenrolled into a program after being exited. If this is the case, verify with a supervisor that the client can be re-enrolled per program policy.



Tips and Tricks - *Editing Enrollments - Re-Entering an Enrollment*

- Re-entering an enrollment will effectively delete any program exit information – including assessments - that you previously captured, so if you need to retain any of that information, and need assistance, contact the HMIS Systems Team.

Figure 5-40 – Tips and Tricks – Editing Enrollments – Reentering an Enrollment

ClientTrack will not allow you to use the "Re Enter the Enrollment" after the enrollment has been closed for more than 90 days. To reenter an enrollment after 90 days, contact the HMIS Systems team at hmis@changinghomelessness.org.

The "Re Enter the Enrollment" option is only available to the organization that created the enrollment. To reenter an enrollment for an enrollment created by another agency, contact the HMIS Systems team at hmis@changinghomelessness.org.

Steps to Reenter a Closed Enrollment

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".*

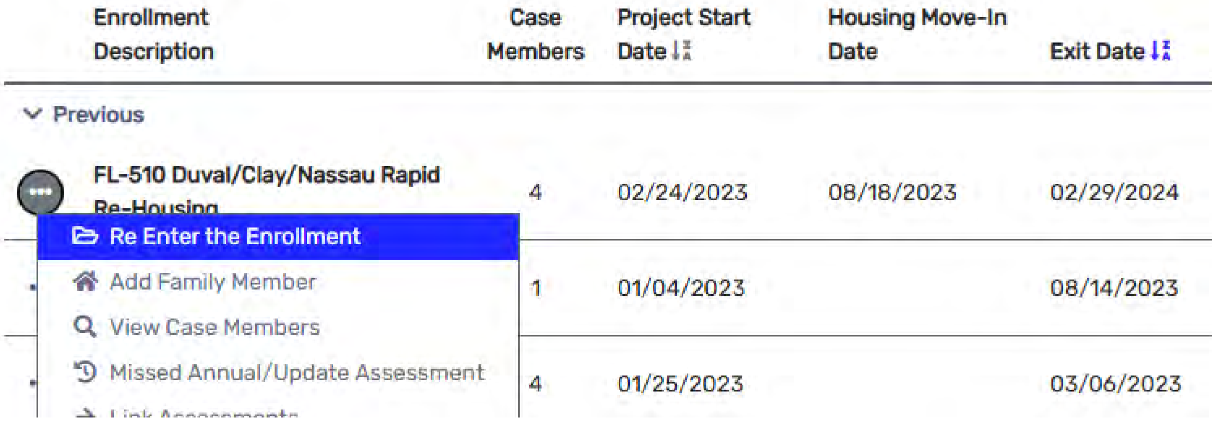
Step 3: Select the action button* next to the appropriate enrollment. Select "Re Enter the Enrollment". A pop-up window will appear confirming the enrollment has been reentered.

**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".*

Once selected, the exit date will disappear from the enrollment on the "Client Dashboard" and "Enrollments" menu option. Also, the date on the "Last Assessment Completed" (which prior to re-entering the enrollment was the exit date), now reflects the last assessment prior to the exit date – usually the Enroll Date.

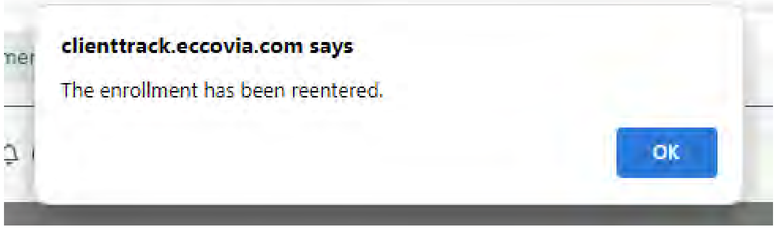
If there are other family members enrolled in the program that need to be reenrolled, continue to Step 4. Click, "OK."

Repeat this step for any applicable family member(s).



Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date
Previous				
FL-510 Duval/Clay/Nassau Rapid Re-Housing	4	02/24/2023	08/18/2023	02/29/2024
	1	01/04/2023		08/14/2023
	4	01/25/2023		03/06/2023

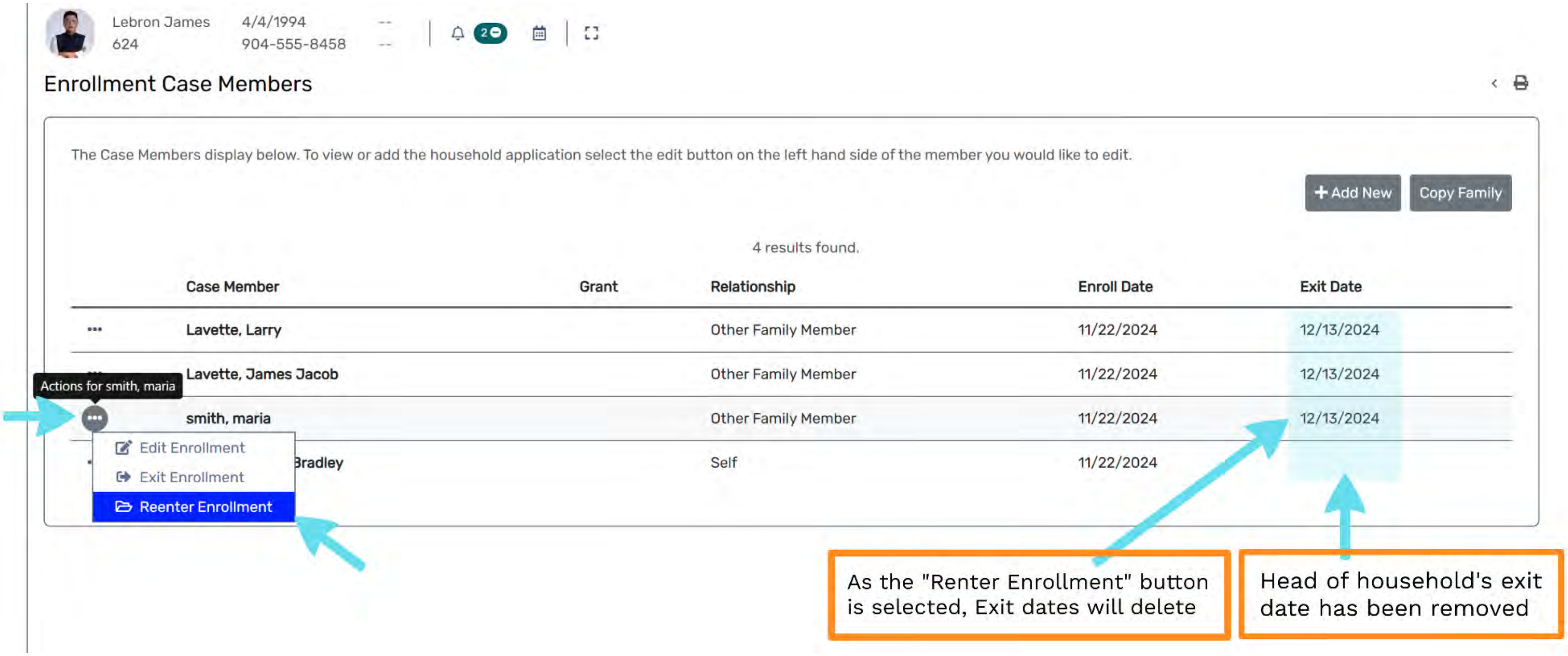
Figure 5-41 – Re Enter the Enrollment



clienttrack.eccovia.com says

The enrollment has been reentered.

Figure 5-42 – Enrollment has been reentered confirmation



Enrollment Case Members

The Case Members display below. To view or add the household application select the edit button on the left hand side of the member you would like to edit.

4 results found.

Case Member	Grant	Relationship	Enroll Date	Exit Date
Lavette, Larry		Other Family Member	11/22/2024	12/13/2024
Lavette, James Jacob		Other Family Member	11/22/2024	12/13/2024
smith, maria		Other Family Member	11/22/2024	12/13/2024
Bradley		Self	11/22/2024	

As the "Renter Enrollment" button is selected, Exit dates will delete

Head of household's exit date has been removed

Figure 5-43 – Reentering Enrollments through Enrollment Case Members

Assessments

Assessments* in ClientTrack is a data collection tool designed to accommodate data collection needs by both HUD (Universal Data Elements) and specific program requirements (Program Specific Data Elements).

**For more information on the Assessment folder in ClientTrack's Client Workspace, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Assessments: Folder*

A "Master Assessment" form creates an "Assessment ID" which ties Universal Data Element Assessments (Universal Data Assessments) with Program Specific Data Element Assessments (Program Specific Assessments). This is why it is so important to assess clients using a Master Assessment rather than using an "a la carte" approach – otherwise any information captured will not populate correctly on specific reports. When navigating through built-in workflows*, the Master Assessment is used.

**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".*

Master Assessments include an Entry Master assessment, an Annual Master Assessment (if applicable), and an Exit Master Assessment.

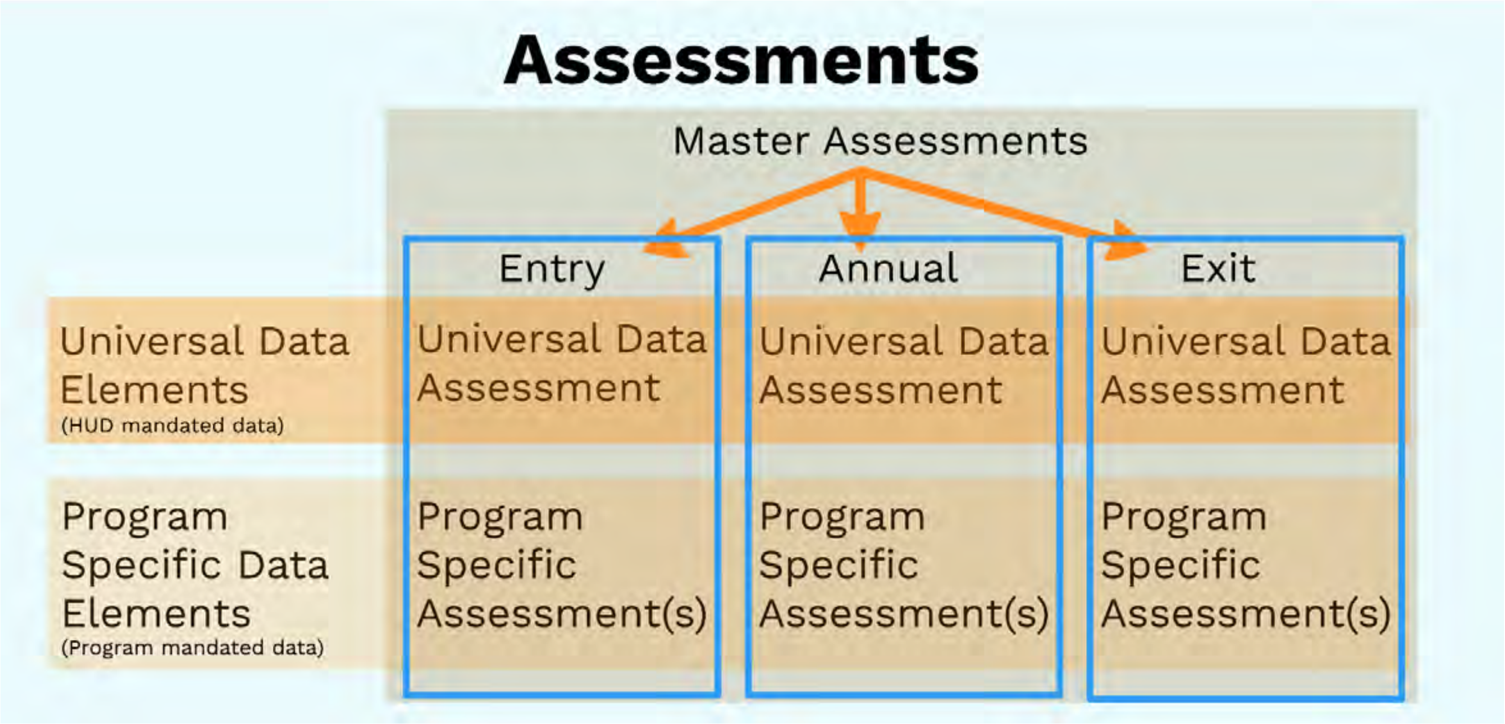


Figure 5-44 – Assessments in ClientTrack

Editing Assessments

When to Edit Assessments

Data is captured in three main points in time for a client enrolled in a program: once at entry (enrollment), during the enrollment (either an annual assessment or update) and upon exit from a program.

Assessments are chronological and shouldn't be edited. Edit assessments only due to user error or due to incorrect information received by a client.

For more information and help editing assessments, reach out to the HMIS Team at hmis@changinghomelessness.org.

Examples of When an Assessment May or May Not be Edited

Scenario #1: A case manager enrolled a client into the SSVF Homeless Prevention Program on March 3rd, 2025. At the time, the client reported that the except for themself, the rest of the family had no health insurance. The case manager finds on March 21st, 2025 that the family is in fact insured under Medicaid and has been since 2023.

Logic: Since the client's family was insured with Medicaid since 2023, that means the client's family was insured at the point they were enrolled into the program. You would edit the enrollment workflow to correct this information.

Scenario #2: A case manager enrolled a client into the SSVF Rapid Rehousing Program on April 8th, 2025. The client reported that the except for themself, the rest of the family had no health insurance. You find out on April 30th, 2025 that the family is now covered by Medicaid.

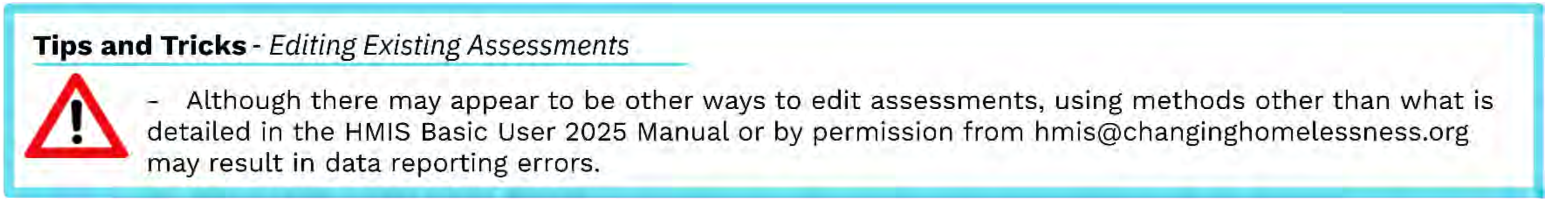
Logic: Since the client's family was not insured at the point they were enrolled into the program, the case manager would not update a previously completed workflow or assessment. Instead, the case manager would use "Update/Annual Assessment"*

**For more information and instructions on annual assessments, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/Assessments: Folder/Annual Assessments*

How to Edit Assessments

This section contains information and instructions on editing assessments at the enrollment/entry into the program. Before editing any existing assessment, it must be determined a client's assessment* data captured needs to be edited.

**For information on when to edit assessments for existing enrollments, see Chapter 5: Basics of Entering Data into ClientTrack/Assessments/When to Edit Assessments*



Tips and Tricks - *Editing Existing Assessments*

- Although there may appear to be other ways to edit assessments, using methods other than what is detailed in the HMIS Basic User 2025 Manual or by permission from hmis@changinghomelessness.org may result in data reporting errors.

Steps to Editing an Assessment

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".*

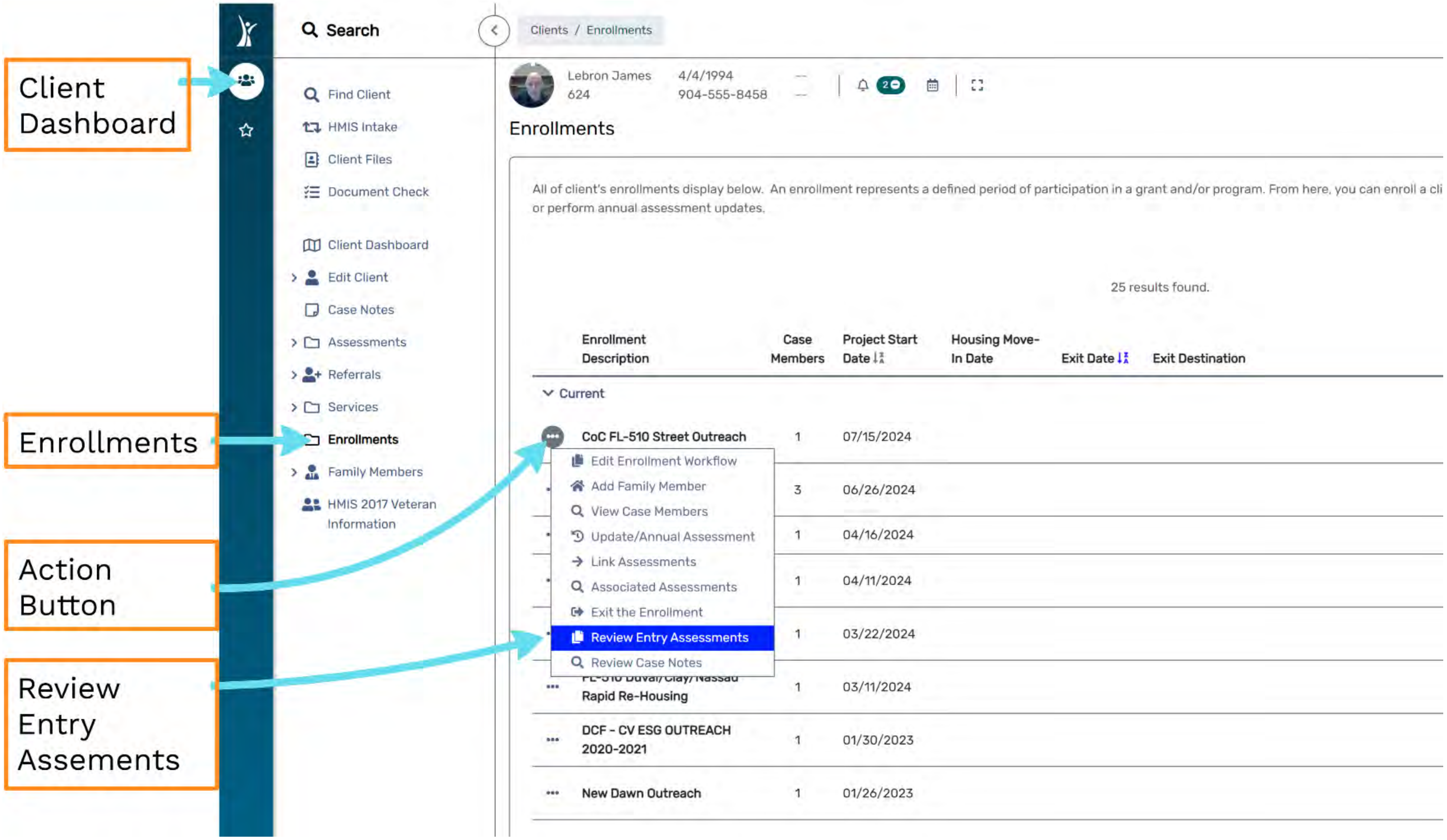
Step 2: Select the "Enrollments" secondary sidebar* menu option. ClientTrack will navigate to the "Enrollments" workspace container.

**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".*

Step 3: Select the action button* next to the appropriate enrollment. Select "Review Entry Assessments." If a client has been exited from the program, there will be an additional option to select "Review Exit Assessments." ClientTrack will navigate to the "Assessment Status" workspace container of the applicable selection.

This will display all the individual assessments that were completed as part of the Intake/Enrollment Workflow for that client. For minors (under 18), fewer assessments are required.

** 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".*



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

Enrollments

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 cli or perform annual assessment updates.

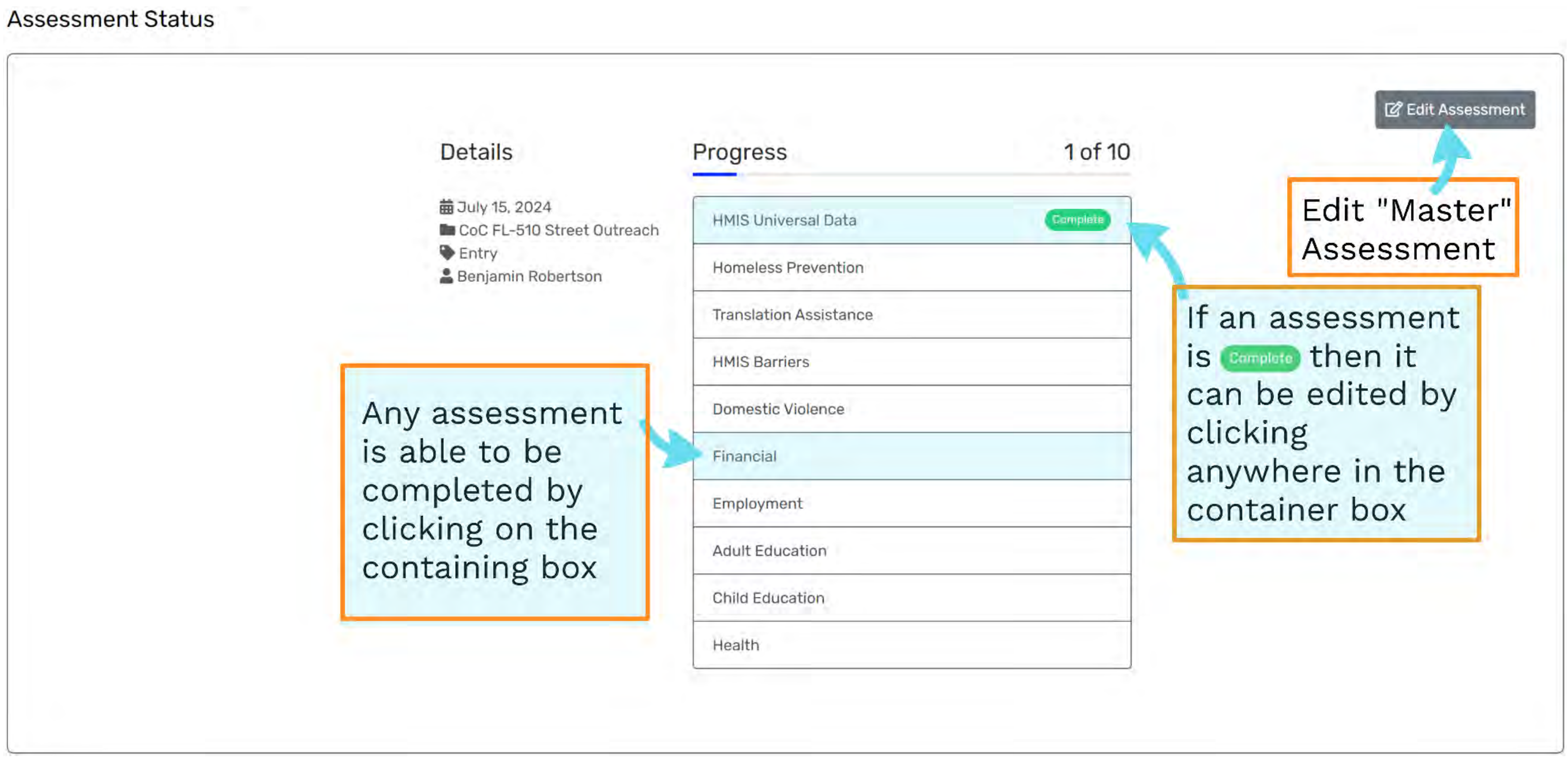
25 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination
Current					
CoC FL-510 Street Outreach	1	07/15/2024			
	3	06/26/2024			
	1	04/16/2024			
	1	04/11/2024			
	1	03/22/2024			
FL-510 Duval/Clay/Nassau Rapid Re-Housing	1	03/11/2024			
DCF - CV ESG OUTREACH 2020-2021	1	01/30/2023			
New Dawn Outreach	1	01/26/2023			

Figure 5-45 – Review Client Entry Assessments

Step 4: Click in the box of the appropriate assessment to edit*. Once the box has been selected, ClientTrack will navigate to the selected assessment form in the workspace container.

**All assessments completed and required in the Intake/Enrollment Workflow (if the Enrollment/Intake workflow was completed) will have a green "Complete" icon to the far right.*



July 15, 2024
CoC FL-510 Street Outreach
Entry
Benjamin Robertson

- HMIS Universal Data — Complete
- Homeless Prevention
- Translation Assistance
- HMIS Barriers
- Domestic Violence
- Financial
- Employment
- Adult Education
- Child Education
- Health

Edit "Master" Assessment

If an assessment is Complete then it can be edited by clicking anywhere in the container box

Any assessment is able to be completed by clicking on the containing box

Figure 5-46 – Editing/Completing Entry Assessments

Step 5: Fill out the assessment form as applicable*. Required elements are marked with a (*).

Step 6: Click “Save” to record any changes. Click “Cancel” to exit without saving. ClientTrack will navigate to the Assessment Status workspace container.

Table of Images