Enrollments

Last Updated: Sept 25, 2023

Summary

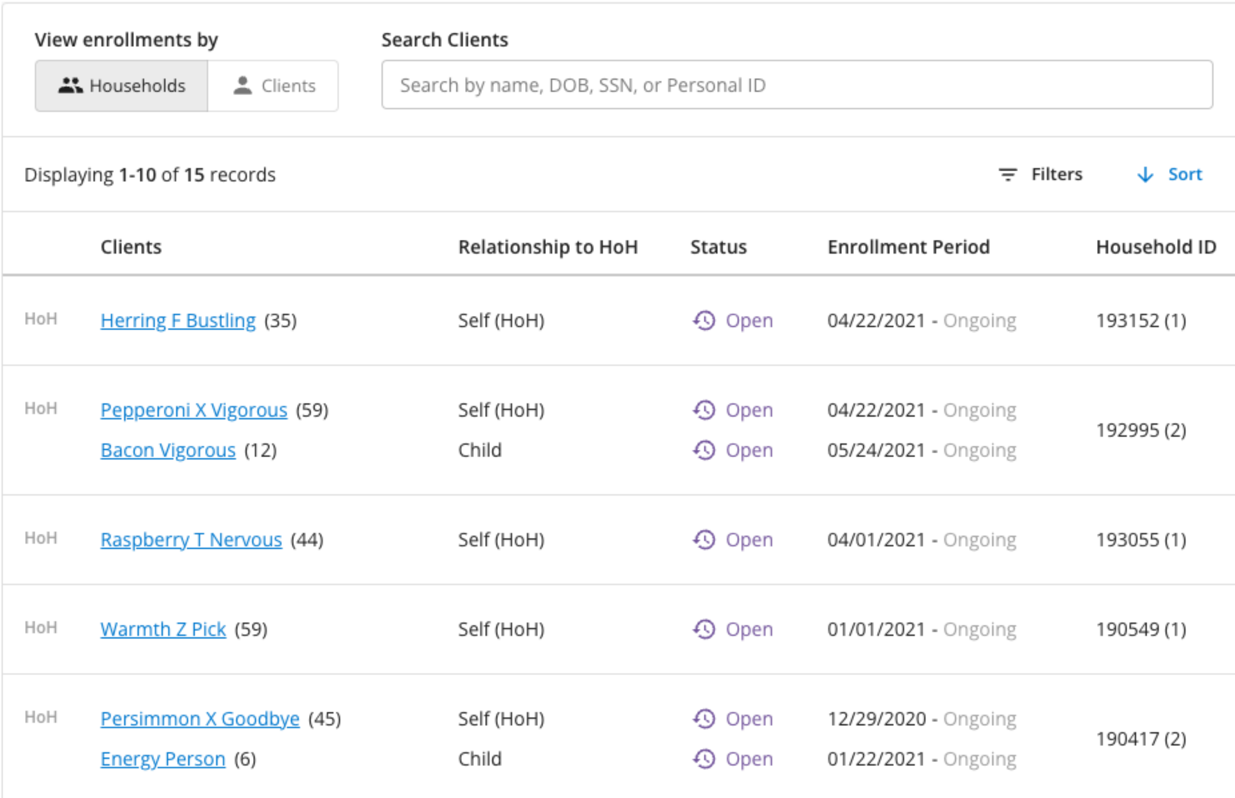
The purpose of this document is to provide instruction on managing Enrollments in HMIS. This includes a basic overview and details on adding an enrollment, adding a client through an enrollment, editing an enrollment, and deleting an enrollment.

Enrollments Overview

Enrollments are accessed by going to a specific project and on clicking **Enrollments** in the left menu. This will take you to the main enrollments table, which by default shows all active enrolled clients.

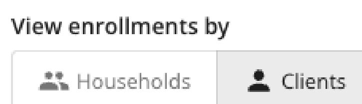
The table contains several columns:

- **Clients:** Name of client, age of client, and whether the client is head of household. By default, clients are grouped together by household.
- **Relationship to HoH:** Describes the relationship of the client to the head of household (e.g. Self, Child, Spouse or Partner, Other relative, Unrelated household member)
- **Status:** Enrollment status of the client (Open, Exited, or Incomplete)
- **Enrollment Period:** Shows the timespan of enrollment, from the date of initial intake to exit. If the client is active, it will show from the date of initial intake and indicate that the enrollment is ongoing.
- **Household ID:** The specific ID tied to that household.



You can control the view of the enrollments table in several ways.

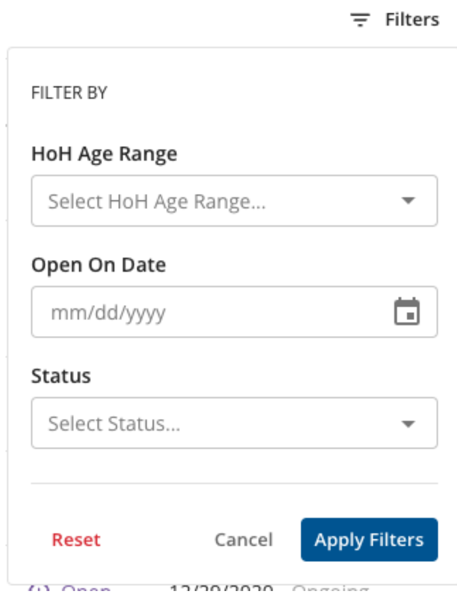
- **View enrollments by Clients instead of Households:** To do this, click the **Clients** button under "View enrollments by" in the top left corner. This will change the view from the default household view to an individual client view.



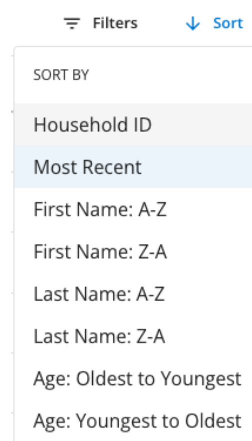
- **Search:** You can search for a specific client by typing their name, date of birth, social security number, or Personal ID in the search bar at the top. This will narrow the view of clients displayed in the enrollments table to only clients that meet your search criteria.

- **Filter:** You can filter clients by a number of parameters. To filter, click on the Filters button in the top right corner. Once you click Filter, this will narrow the view of clients displayed in the enrollments table to only clients that meet your filter criteria.

- HoH Age Range (only available when viewing enrollments by household): Filter on the age range of the Head of Household
- Open On Date: Filter by date client was enrolled
- Status: Filter by Incomplete, Active, or Exited status



- **Sort:** When viewing enrollments by Clients, you can sort the list by a number of parameters. To sort, click on the Sort button in the top right corner.
  - Household ID: Numerically in order
  - Most Recent: Chronologically by enrollment date
  - First Name: A-Z or Z-A
  - Last Name: A-Z or Z-A
  - Age: Oldest to Youngest or Youngest to Older

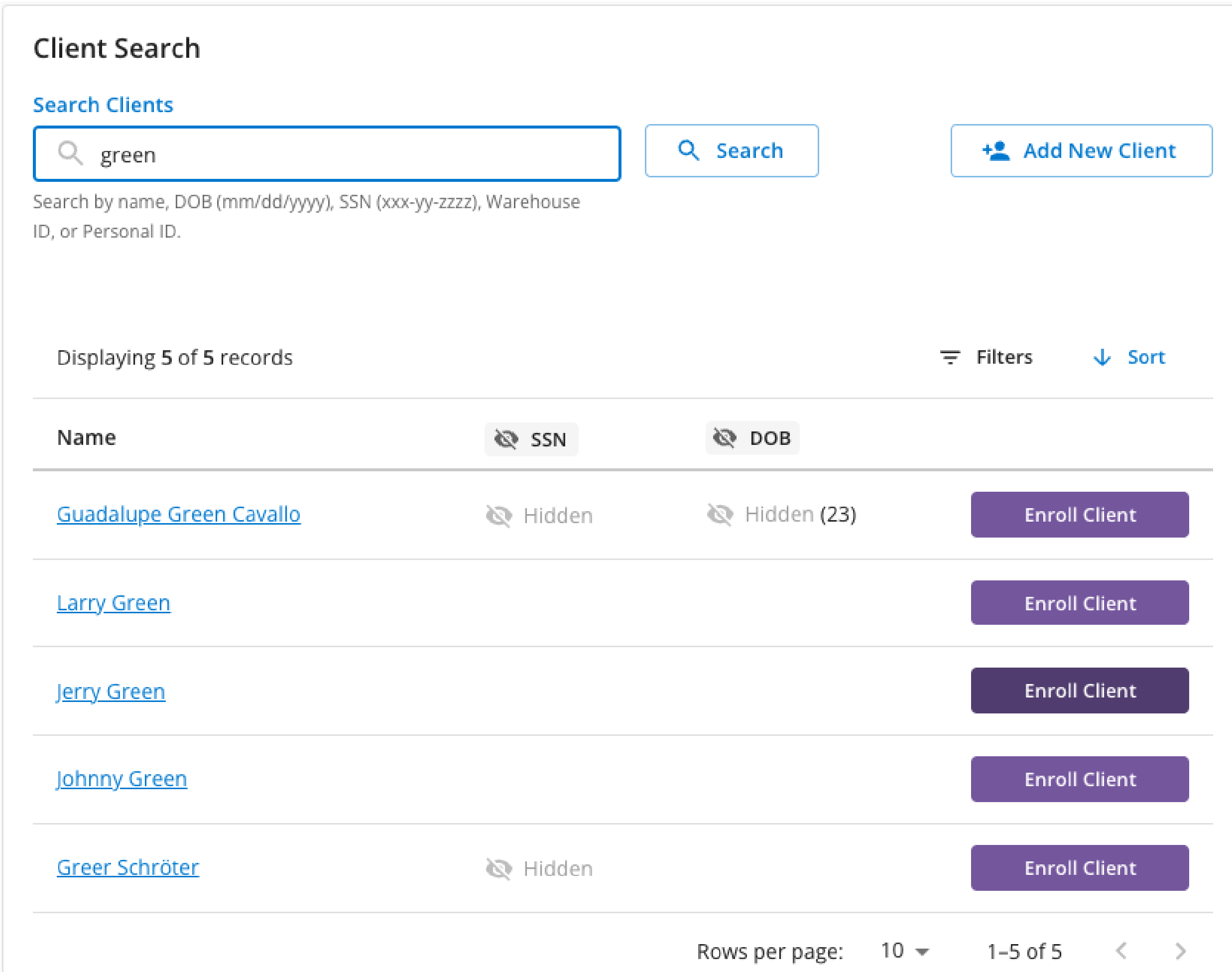


Adding an Enrollment

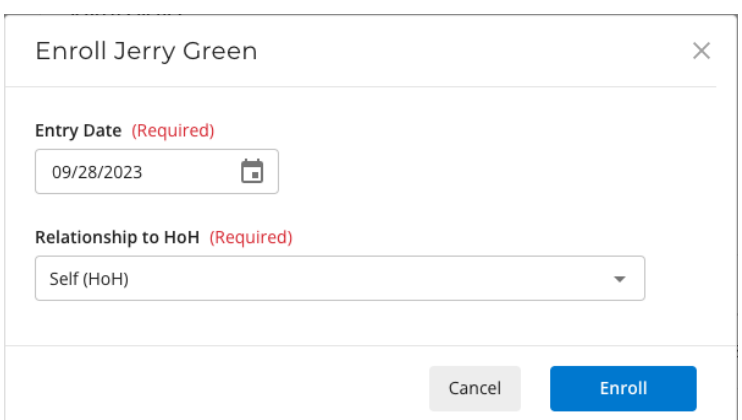
To add an enrollment, click the **Add Enrollment** button in the top right corner of the Enrollments table.

This will take you to a screen where you have to search the name of the client to find and enroll them. You can search by name, date of birth, social security number, Warehouse ID, or Personal Id. Once you search, a list of clients that meet your search criteria will appear.

Find the client you want to enroll and click the **Enroll Client** button to the right of their name.



A pop up will appear for enrolling the client. You must enter the entry date (default will be today's date) and the client's relationship to the Head of Household. If enrolling as an individual, the relationship is "Self (HoH)." Click the **Enroll** button to enroll them.

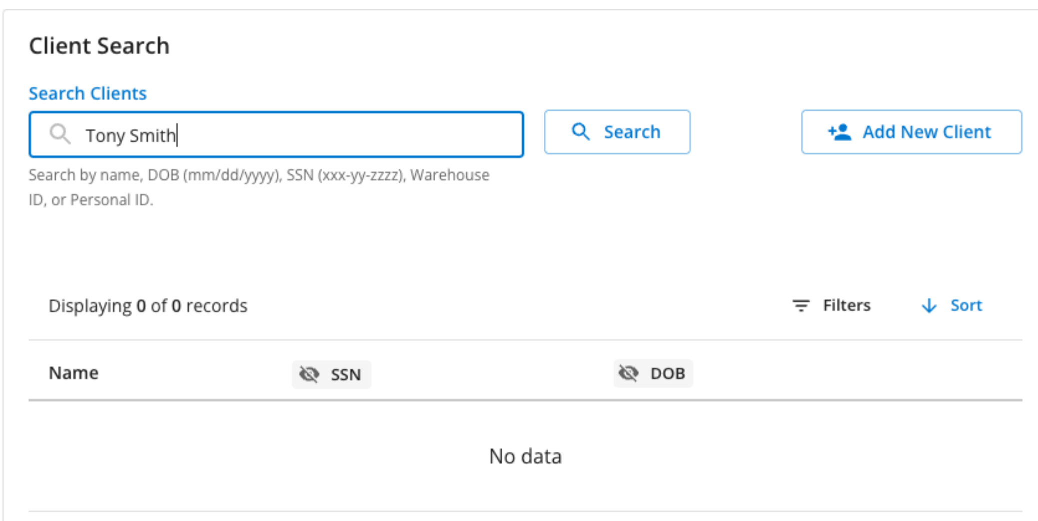


The pop up will close, and your enrolled client will be populated in the Current Household section at the top of the screen. The enrollment period for the client will be in red and say “Date of Enrollment - Incomplete.” To complete the enrollment, you must complete the client’s intake assessment.

Adding a Client through Adding an Enrollment

To enroll a client that is not already in the system, click the **Add Enrollment** button in the top right corner of the Enrollments table.

This will take you to a screen where you have to search the name of the client to find and enroll them. Even if they are a new client, you must still search their name in order to prevent duplicates.



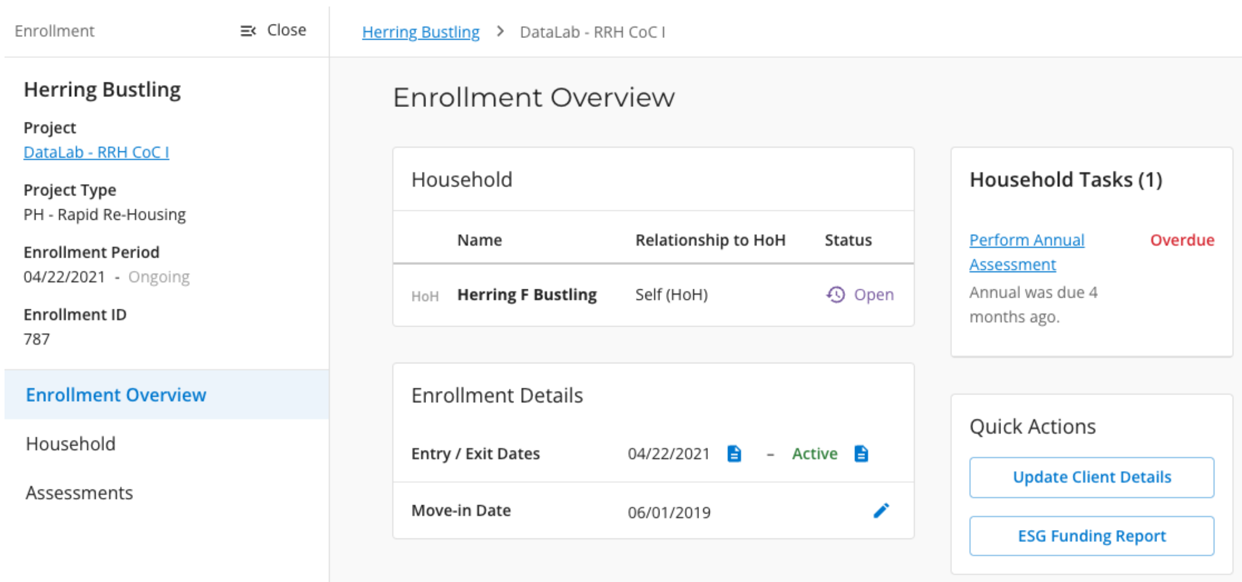
Once you complete the search, an **Add Client** button will appear. Click the button and an enrollment form will pop up.

To enroll the new client, you must fill out client information as well as enrollment information. Once you have completed this, scroll to the bottom and click **Create & Enroll Client**.

The pop up will close, and your enrolled client will be populated in the Current Household section at the top of the screen. The enrollment period for the client will be in red and say “Date of Enrollment - Incomplete.” To complete the enrollment, you must complete the client’s intake assessment.

Editing an Enrollment

To edit an enrollment for a specific client, click on that client’s name in the enrollment table. You will be taken to their enrollment details page. This will show you the name of the client, the project they are enrolled in, the enrollment period, and more.



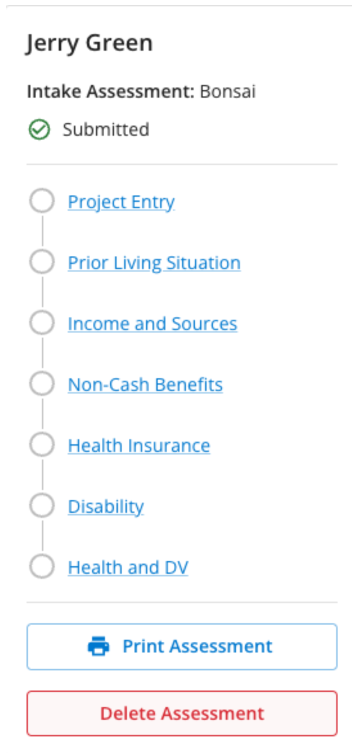
You can edit any part of their enrollment through this page, from the intake assessment to client details.

Deleting an Enrollment

To delete an enrollment where the intake assessment has not yet been filled out, navigate to a specific client’s enrollment details and click the **Delete Enrollment** button in the bottom right. 

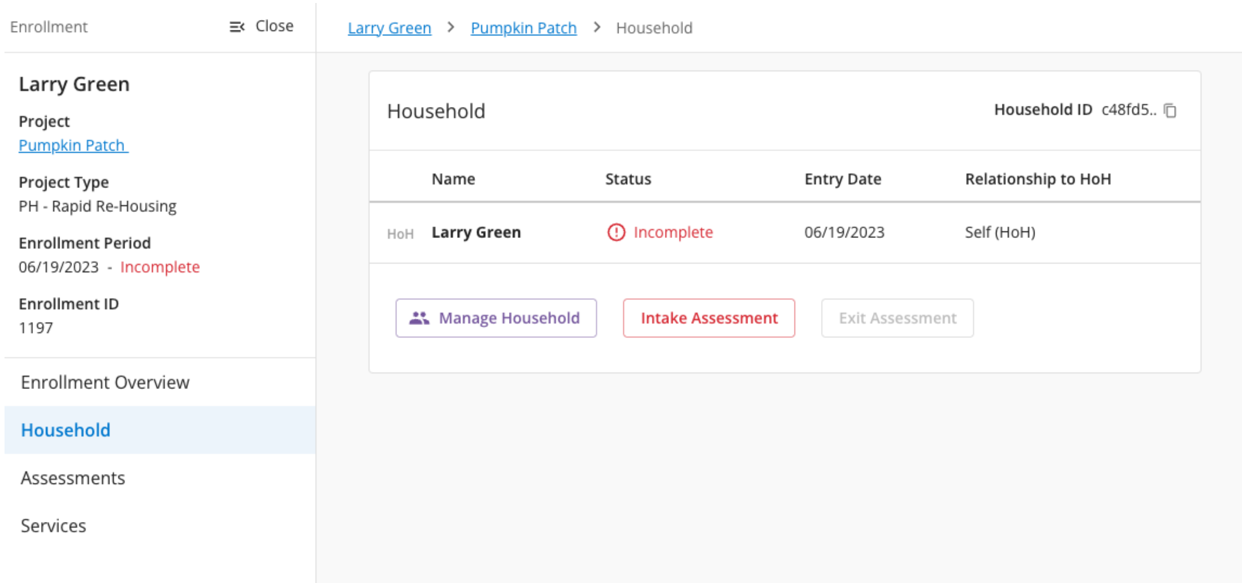
A pop up will appear asking if you are sure about deleting the enrollment. Click **Yes, delete Enrollment** to delete the enrollment.

To delete an enrollment where the intake assessment has already been filled out and the client's status is Open, you must delete their intake assessment. To delete an intake assessment, navigate to the Assessments page in a client's enrollment details, select the intake assessment, and click the **Delete Assessment** button in the left navigation bar of the assessment. You cannot delete an intake assessment for a Head of Household of a multi-member household without first changing the Head of Household to another member of the household.



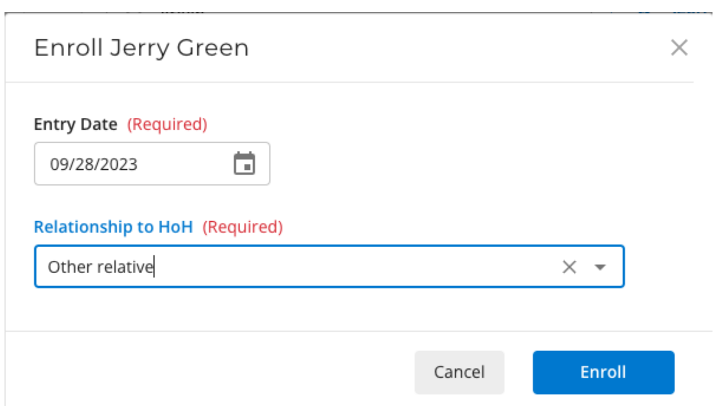
Enrolling a Household with Preexisting Clients

To enroll a household, you must first enroll the Head of Household following the above steps. Then, navigate to that client's enrollment details page and click the **Household** tab on the left navigation menu.



Click on the **Manage Household** button to edit the household. 

Then, search the name of the other household member(s) in the Search bar. Add all of the additional members using the **Add to Household** button to the right of the client name. A pop up will appear for enrolling the client. You must enter the entry date (default will be today's date) and the client's relationship to the Head of Household. Click the **Enroll** button to enroll them.



The pop up will close, and the new client will be added to the Current Household section at the top of the screen. The enrollment period for the client will be in red and say "Date of Enrollment - Incomplete." To complete the enrollment, you must complete the client's intake assessment.

If a household was previously enrolled within the organization, when you open the Manage Household page, you will see a section called Previously Associated Members. This will contain clients that were in a household together previously. To add them, click the **Add to Household** button.

Enrolling a Household with New Clients

To add a new client to the household, search the name of the household member, then click the **Add New Client** button that appears next to the search. 

Even if they are a new client, you must still search their name in order to prevent duplicates.

To enroll the new client, you must fill out client information as well as enrollment information. You must enter the entry date (default will be today's date) and the client's relationship to the Head of Household. Once you have completed this, scroll to the bottom and click **Create & Enroll Client**.

The pop up will close, and the new client will be added to the Current Household section at the top of the screen. The enrollment period for the client will be in red and say “Date of Enrollment - Incomplete.” To complete the enrollment, you must complete the client's intake assessment.