

Enrollments

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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.

View enrollments by

Households

Clients

Search Clients

Search by name, DOB, SSN, or Personal ID

Displaying 1-10 of 15 records

Filters

Sort

Clients	Relationship to HoH	Status	Enrollment Period	Household ID
HoH Herring F Bustling (35)	Self (HoH)	Open	04/22/2021 - Ongoing	193152 (1)
HoH Pepperoni X Vigorous (59)	Self (HoH)	Open	04/22/2021 - Ongoing	192995 (2)
Bacon Vigorous (12)	Child	Open	05/24/2021 - Ongoing	
HoH Raspberry T Nervous (44)	Self (HoH)	Open	04/01/2021 - Ongoing	193055 (1)
HoH Warmth Z Pick (59)	Self (HoH)	Open	01/01/2021 - Ongoing	190549 (1)
HoH Persimmon X Goodbye (45)	Self (HoH)	Open	12/29/2020 - Ongoing	190417 (2)
Energy Person (6)	Child	Open	01/22/2021 - Ongoing	

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.

View enrollments by

Households

Clients

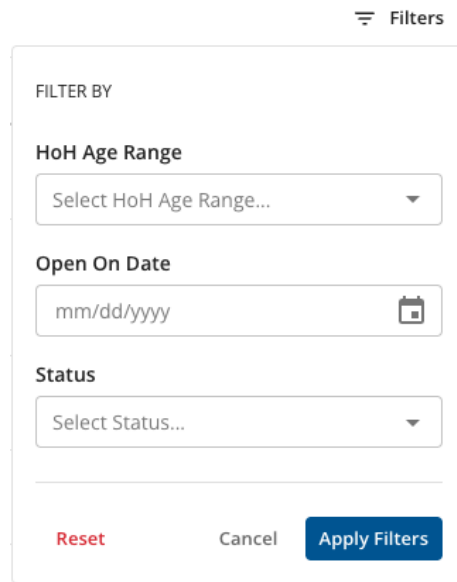
- **Search:** You can search for a specific client by typing their name, date of birth, social security number, or Personal ID in the search bar at the top. This will narrow the view of clients displayed in the enrollments table to only clients that meet your search criteria.

Search Clients

Search by name, DOB, SSN, or Personal ID

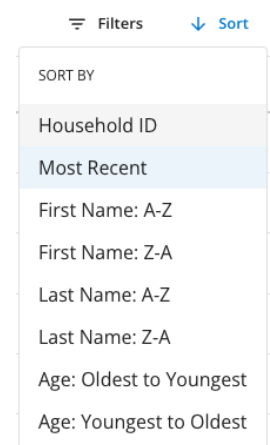
- **Filter:** You can filter clients by a number of parameters. To filter, click on the Filters button in the top right corner. Once you click Filter, this will narrow the view of clients displayed in the enrollments table to only clients that meet your filter criteria.

- 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



A modal window titled "Filters" with a close button (three horizontal lines). It contains three filter sections: "HoH Age Range" with a dropdown menu labeled "Select HoH Age Range...", "Open On Date" with a text input labeled "mm/dd/yyyy" and a calendar icon, and "Status" with a dropdown menu labeled "Select Status...". At the bottom are three buttons: "Reset" (red text), "Cancel", and "Apply Filters" (blue button).

- **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



A dropdown menu titled "Sort" with a blue arrow icon. It lists several sorting options: "Household ID", "Most Recent" (highlighted in blue), "First Name: A-Z", "First Name: Z-A", "Last Name: A-Z", "Last Name: Z-A", "Age: Oldest to Youngest", and "Age: Youngest to Oldest".

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.

Client Search

Search Clients

Search by name, DOB (mm/dd/yyyy), SSN (xxx-yy-zzzz), Warehouse ID, or Personal ID.

Displaying 5 of 5 records Filters Sort

Name	SSN	DOB	
Guadalupe Green Cavallo	Hidden	Hidden (23)	Enroll Client
Larry Green			Enroll Client
Jerry Green			Enroll Client
Johnny Green			Enroll Client
Greer Schröter	Hidden		Enroll Client

Rows per page: 10 1-5 of 5 < >

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.

Enroll Jerry Green

Entry Date (Required)

09/28/2023

Relationship to HoH (Required)

Self (HoH)

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.

Client Search

Search Clients

Search

Add New Client

Search by name, DOB (mm/dd/yyyy), SSN (xxx-yy-zzzz), Warehouse ID, or Personal ID.

Displaying 0 of 0 records

Filters Sort

Name	SSN	DOB
No data		

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.

Enrollment

Close

Herring Bustling > DataLab - RRH CoC I

Herring Bustling

Project

DataLab - RRH CoC I

Project Type

PH - Rapid Re-Housing

Enrollment Period

04/22/2021 - Ongoing

Enrollment ID

787

Enrollment Overview

Household

Assessments

Enrollment Overview

Household

Name	Relationship to HoH	Status
HoH Herring F Bustling	Self (HoH)	Open

Enrollment Details

Entry / Exit Dates	04/22/2021 - Active
Move-In Date	06/01/2019

Household Tasks (1)

[Perform Annual Assessment](#)
Overdue

Annual was due 4 months ago.

Quick Actions

Update Client Details

ESG Funding Report

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.**

Jerry Green
Intake Assessment: Bonsai
 Submitted

☐ [Project Entry](#)
☐ [Prior Living Situation](#)
☐ [Income and Sources](#)
☐ [Non-Cash Benefits](#)
☐ [Health Insurance](#)
☐ [Disability](#)
☐ [Health and DV](#)

 [Print Assessment](#)

[Delete Assessment](#)

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.

Enrollment

Close

[Larry Green](#) > [Pumpkin Patch](#) > Household

Larry Green

Project

[Pumpkin Patch](#)

Project Type

PH - Rapid Re-Housing

Enrollment Period

06/19/2023 - Incomplete

Enrollment ID

1197

Enrollment Overview

Household

Assessments

Services

Household

Household ID c48fd5..

Name	Status	Entry Date	Relationship to HoH
HoH Larry Green	ⓘ Incomplete	06/19/2023	Self (HoH)

Manage Household

Intake Assessment

Exit Assessment

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

 **Manage 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.

Enroll Jerry Green

×

Entry Date (Required)

09/28/2023

📅

Relationship to HoH (Required)

Other relative

×

▼

Cancel

Enroll

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.

Previously Associated Members		
Name	 SSN	 DOB
Larry Green		
		<button>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.