

How to Guide

Entering the “Housing Move in Date” for RRH and/or PSH Enrollments in HMIS and DV ClientTrack

1. Select the **“Clients”** icon in the upper left corner, then click on **“Find Client”** to locate your client’s record. Type the first few letters of your client’s first and last name before clicking on the **“Search”** button to find the client. You can also enter date of birth and/or social security number to look for your client. Next, click on the client’s name to go to your client’s **“Client Dashboard”**.

Search

Clients / ClientTrack Form

Client Dashboard

Find Client

Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Profile

Common Client Assessments

Other Assessments

Client Enrollment and Client Services

Client Dashboard

1/1/2000 XXX-XX-0000 1048334

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:

Birth Date: MM/DD/YYYY

Client ID:

Search

1 result found.

First Name	Last Name	Middle Name	SSN	Birth Date	Client ID
Luke	Skywalker		XXX-XX-0000	01/01/2000	1048334

2. Click on the three dots located to the left of the open enrollment.

Clients / Client Dashboard

Client Dashboard

1/1/2000 XXX-XX-0000 1048334

Luke Skywalker's Dashboard

Luke Skywalker's Information

Name: Skywalker, Luke Birth Date: 1/1/2000 Age: 22

Gender: Male Veteran: Data Not Collected

Ethnicity: Data not collected Race: Data not collected

Enrollments

2 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination	Last Assessed
PH - Rapid Re-Housing								
My Fake Organization CoC RRH (RRH-R8)	1	11/07/2022			1971923			11/7/2022
Exited								

3. Click on “Edit Project Entry Workflow”

The screenshot shows the 'Client Dashboard' for Luke Skywalker. The client's information is displayed at the top: Luke Skywalker, Social Security Number XXX-XX-0000, Client ID 1048334. Below this, the 'Luke's Enrollments' section shows 2 results found. A table lists the enrollments with columns for Enrollment Description, Case Members, Project Start Date, Housing Move-In Date, Project Exit Date, Enroll Assessment ID, Exit Assessment ID, Exit Destination, and Last Assessed. A dropdown menu is open for the enrollment 'My Fake Organization CoC RRH', and the 'Edit Project Entry Workflow' option is highlighted with a red arrow.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination	Last Assessed
My Fake Organization CoC RRH	1	11/07/2022			1971923			11/7/2022
My Fake Organization CoC RRH				11/07/2022	1971922	1971924	Data not collected	11/7/2022

4. The workflow will launch.

- On the “Basic Client Information” Assessment click “No Changes” in the bottom right corner of the screen.
- On the “Family Members” Assessment click “Save and Close” in the bottom right corner of the screen.
- On the “HUD Program Enrollment” Assessment complete the “Housing Move in Date” field (Head of Household only) then click “Save” in the bottom right corner of the screen.

HUD Program Enrollment

The screenshot shows the 'HUD Program Enrollment' form. It includes a description of the HUD program, the project name 'My Fake Organization CoC RRH (RRH-R8)', and a 'Household' section. The 'Household' section contains a table with columns for Name, Gender, Age, Project Start Date, Case Manager, Relationship to Head of Household, and Housing Move-in Date. The 'Housing Move-in Date' field for Luke Skywalker is highlighted with a red box. At the bottom right, there are 'Save' and 'No Changes' buttons, with a red arrow pointing to the 'Save' button.

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: * My Fake Organization CoC RRH (RRH-R8) ⓘ

Household

Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Case Manager ⓘ	Relationship to Head of Household*	Housing Move-in Date
<input checked="" type="checkbox"/>	Skywalker, Luke	Male	22	11/07/2022	David Boltz	Self	11/07/2022

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5. Click **“Save”** on the **“Universal Data”** Assessment.
6. Click **“Save and Close”** on the **“Barriers”** Assessment.
7. Click **“No Changes”** on the **“Domestic Violence”** Assessment.
8. Click **“No Changes”** on the **“Income and Sources/Non-Cash Benefits”** Assessment.
9. Continue through the **“Edit Project Entry Enrollment”** workflow for each family member by clicking **“No Changes”**, **“Save”** or **“Save and Close”** on every Assessment for each family member. **NOTE: When the option is “Save” or “Save and Close”, click “Save and Close” to advance the workflow.**
10. To **“Finish”** the **“Edit Project Entry Enrollment”** workflow you must click on the **“Finish”** box to complete the workflow.
11. After clicking **“Finish”** you will be returned to the Client’s Dashboard and the **“Housing Move in Date”** will appear on the enrollment for the RRH project.

The screenshot shows the 'Client Dashboard' for Luke Skywalker. At the top, client details are listed: Luke Skywalker, Social Security Number XXX-XX-0000, and Client ID 1048334. Below this is the 'Luke Skywalker's Dashboard' section, which includes 'Luke Skywalker's Information' and 'Luke's Enrollments'.

Luke Skywalker's Information:

- Name: Skywalker, Luke
- Birth Date: 1/1/2000
- Age: 22
- Gender: Male
- Veteran: Data Not Collected
- Ethnicity: Data not collected
- Race: Data not collected

Luke's Enrollments:

2 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination	Last Assessed
Active								
PH - Rapid Re-Housing								
My Fake Organization CoC RRH (RRH-R8)	1	11/07/2022	11/07/2022		1971923			11/7/2022
Exited								

For questions on this process in DV ClientTrack, please submit a ticket to the DVHelpDesk@ihcda.IN.gov

For questions on this process in HMIS, please submit a ticket to the HMISHelpDesk@ihcda.IN.gov