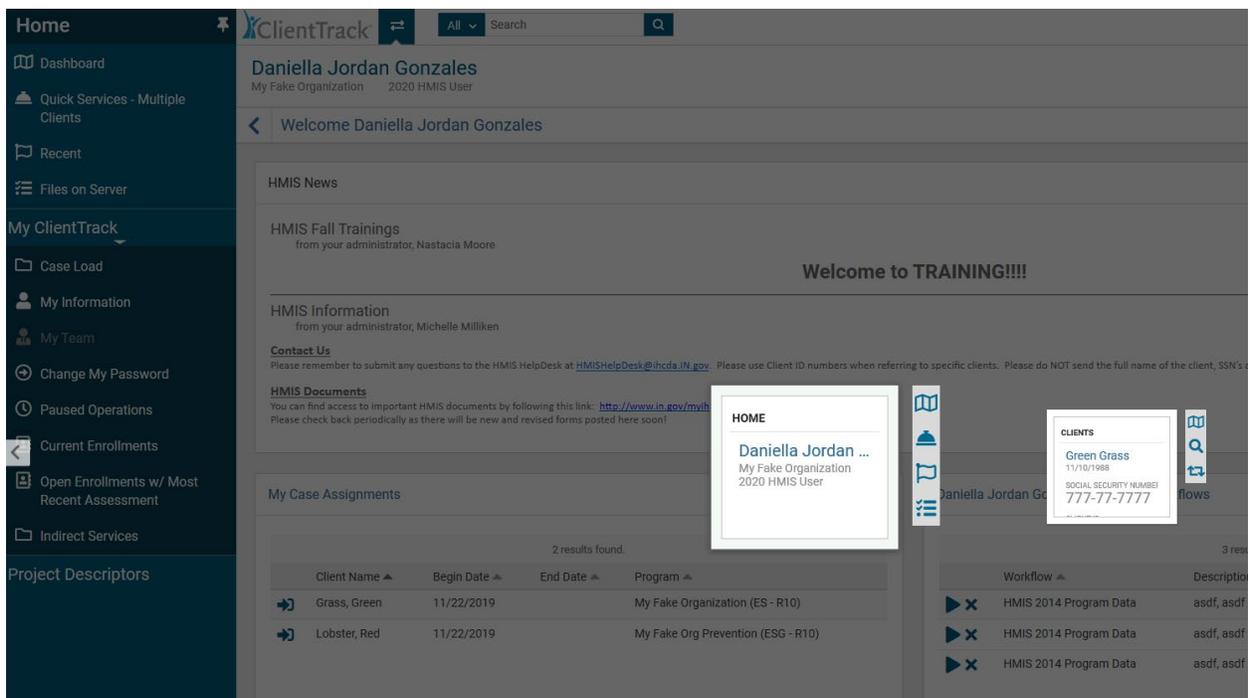
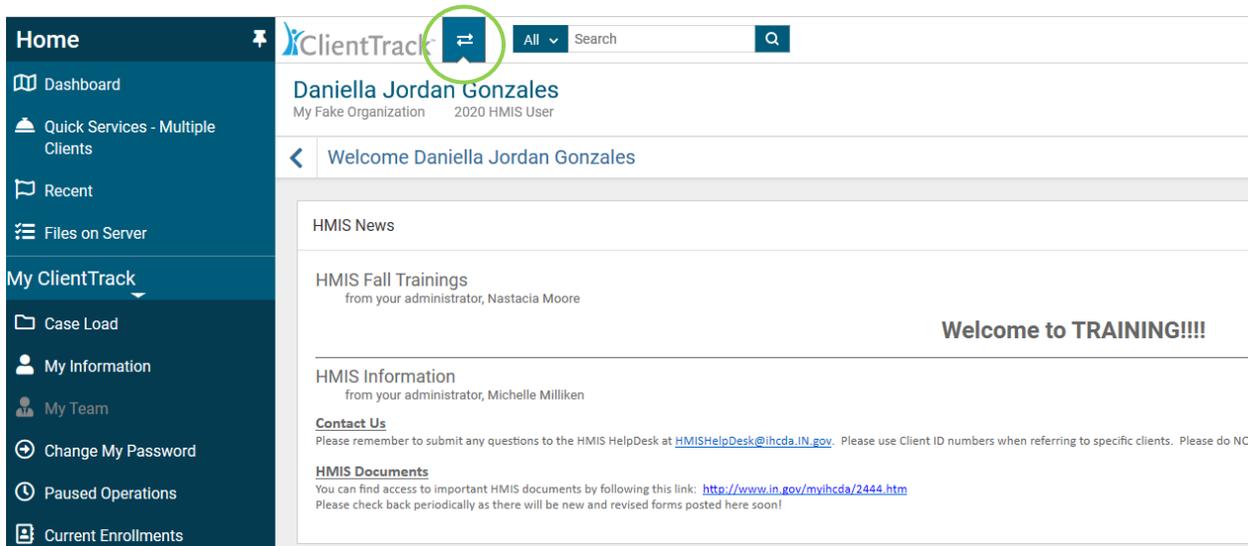


How to Change the Enrollment and/or Exit Date

Follow the instructions below to change the enrollment and/or exit dates if a client's enrollment or exit date does not reflect the actual date of enrollment or exit.

1. Log into ClientTrack and go to the "Clients" workspace by clicking on the two inverted arrows icon at the top of your screen as shown in the image below. Then select the "Clients" workspace.



2. Once in the Clients Workspace, click on "Find Client" to find your client's records as shown in the image below. In this case, I looked for Green Grass ID:3331.

ClientTrack

Client

Sort Results Plug-in Test

Tasks & Recurrence

Client Dashboard

Find Client

Add New Client Intake

Signature Test

Client Management

Edit Client Information

Assessments

Family Members

Enrollments

Goals

Client Goals With Actions

Green Grass
11/10/1988

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:

Scan Client ID:

2 results found.

First Name	Last Name	Middle Name	SSN	Birth Date
Green	Grass		XXX-XX-7777	11/10/1988
Green	Tree		XXX-XX-0059	12/10/1989

- Go to the head of household's client record and click on the blue play button found on the client dashboard under "[Client name] Enrollments" shown in the image below.

ClientTrack

Client

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Goals

Client Goals With Actions

Services

Case Notes

Referrals

Client's Tasks

Client Reports

Client's Calendar

Client Surveys

Green Grass
11/10/1988

Green Grass's Dashboard

Green Grass's Information

Name: Grass, Green

Gender: Male

Disabling Condition:

Ethnicity: Non-Hispanic/Latino

Birth Date:

Married?

Veteran:

Race:

Green's Enrollments

1 result found.

Case Name	Enrollment	Members	Enroll Date	Exit Date	Relationship
Grass, Green	My Fake Organization (ES - R10)	1	11/22/2019		SL

Edit Enrollment

Case Members

Goals

Action Plan

Services

Review Entry Assessments

Exit the Enrollment

Exit Workflow

Delete Enrollment

- Select "Edit Enrollment" in the drop-down menu shown in the image above.
- Edit the enrollment date in the box labeled "Enrollment Date" as shown in the image below. Finally, click "Save" at the bottom right-corner of the screen.

Client ClientTrack All Search

Green Grass
11/10/1988

Enrollment Case

Enter the **Enrollment Date**. Identify the **Case**, which includes the **Program, Grant and Family**. Select **Relationship to Head of Household**. Select a **Case** create a **Followup** for the client and case manager if desired.

Name: **Grass, Green**
Enrollment Date: * **11/22/2019**

Case

For a head of household client, use the default value to create a new case. For a family member, use the lookup to select the head of household's case

Case: * **Grass, Green**
Program: * **My Fake Organization (ES - R10)**
Grant: **--SELECT--**
Family: **Grass, Green - 1988**
Make this client the head of the case:
Relationship to Head of Household: * **Self**
Case Manager: **Daniella Jordan Gonzales**
Head of the Case: **--SELECT--**

Besides changing the enrollment date for a client, you can also change the exit date of an enrollment. In order to change the exit date of an enrollment for a client, please follow the steps below.

1. Go to the head of household's client record by following the previous steps 1-2.
2. Go to the head of household's client record and click on the blue play button found on the client dashboard under "[Client name] Enrollments" shown in the image below. Once the drop-down menu appears, click on "Exit the Enrollment".

Client ClientTrack All Search

Green Grass
11/10/1988

Green Grass's Dashboard

Green Grass's Information

Name: **Grass, Green** Birth Date:
Gender: **Male** Married?:
Disabling Condition: Veteran:
Ethnicity: **Non-Hispanic/Latino** Race:

Green's Enrollments

1 result found.

Case Name	Enrollment	Members	Enroll Date	Exit Date	Relationship
Grass, Green	My Fake Organization (ES - R10)	1	11/22/2019		SL

Current

- Edit Enrollment
- Case Members
- Goals
- Action Plan
- Services
- Review Entry Assessments
- Exit the Enrollment**
- EXIT WORKFLOW
- Delete Enrollment

3. Edit the exit date in the box labeled "Exit Date" and click "Save" at the bottom right-corner of your screen.

The screenshot shows the ClientTrack interface for editing a client's enrollment exit. The left sidebar contains navigation options under 'Client' and 'Client Management'. The main content area is titled 'Enrollment Exit' and includes a search bar, client information for 'Green Grass' (DOB: 11/10/1988), and a form to update the exit date and reason. The 'Exit Date' is currently set to 12/05/2019. Below the form is a section for 'Exit All Case Members' with a checkbox. At the bottom, it shows the assigned case manager as Autumn Gale.

Client

- Sort Results Plug-in Test
- Tasks & Recurrence
- Client Dashboard
- Find Client
- Add New Client Intake
- Signature Test

Client Management

- Edit Client Information
- Assessments
- Family Members
- Enrollments
- Goals
- Client Goals With Actions
- Services
- Case Notes
- Referrals

ClientTrack All Search

Green Grass
11/10/1988

Enrollment Exit

To exit the client from the Enrollment, enter the **Exit Date**, and select **Exit Reason** and **Destination**.

Assessment:
No Assessment Selected

Exit Date: * 12/05/2019

Destination: * -- SELECT --

Exit Reason: -- SELECT --

Exit All Case Members

Check the box to save the selected exit date and information for all case members enrolled in the case.

Exit All Case Members:

Assigned Case Manager(s): Autumn Gale

End Case Assignment(s):

Please contact the HMIS Help Desk by emailing HMISHelpDesk@ihcda.in.gov if you need any assistance with changing an enrollment or exit date for a client.