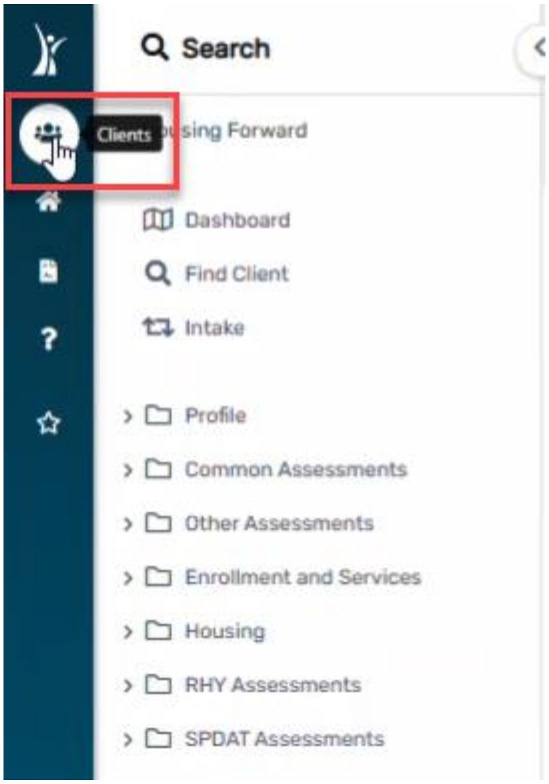
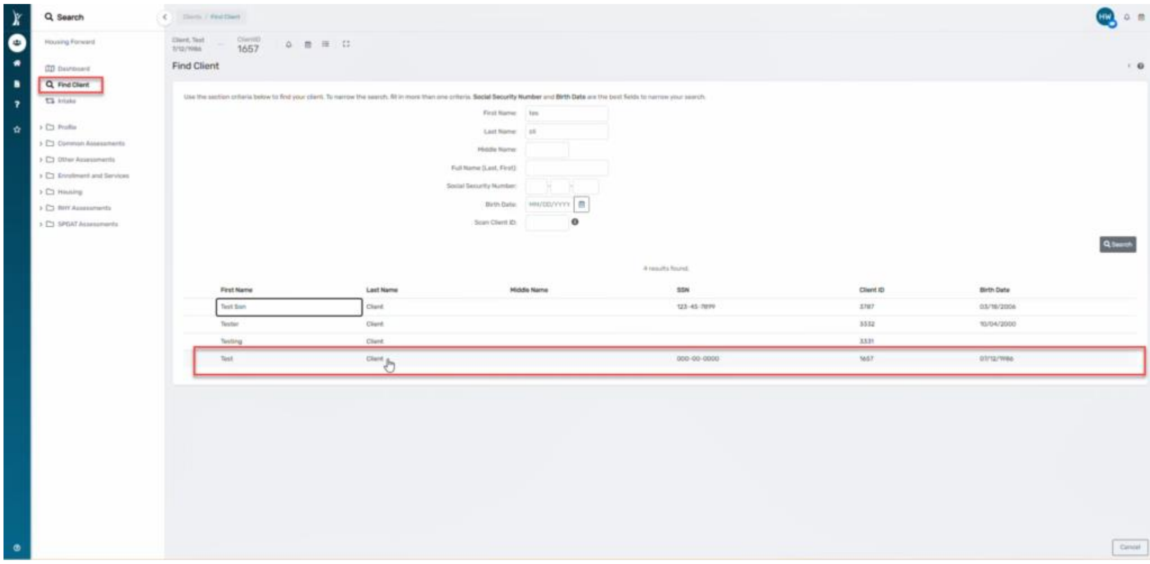
HMIS Cheat Sheet on Creating an Enrollment with Select Individuals Within the Family

To record an Entry Assessment for a client, be sure you are on the **Clients Workspace.**

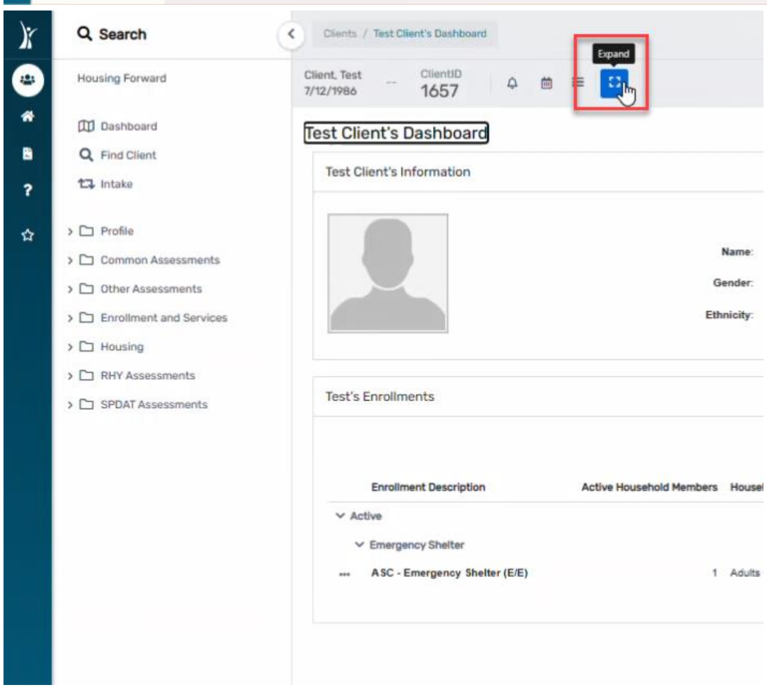


1. Find your client using the **Search** or **Find Client**. (You can do this by (a) searching for the Head of Household and selecting a family member or (b) search directly for the client.)

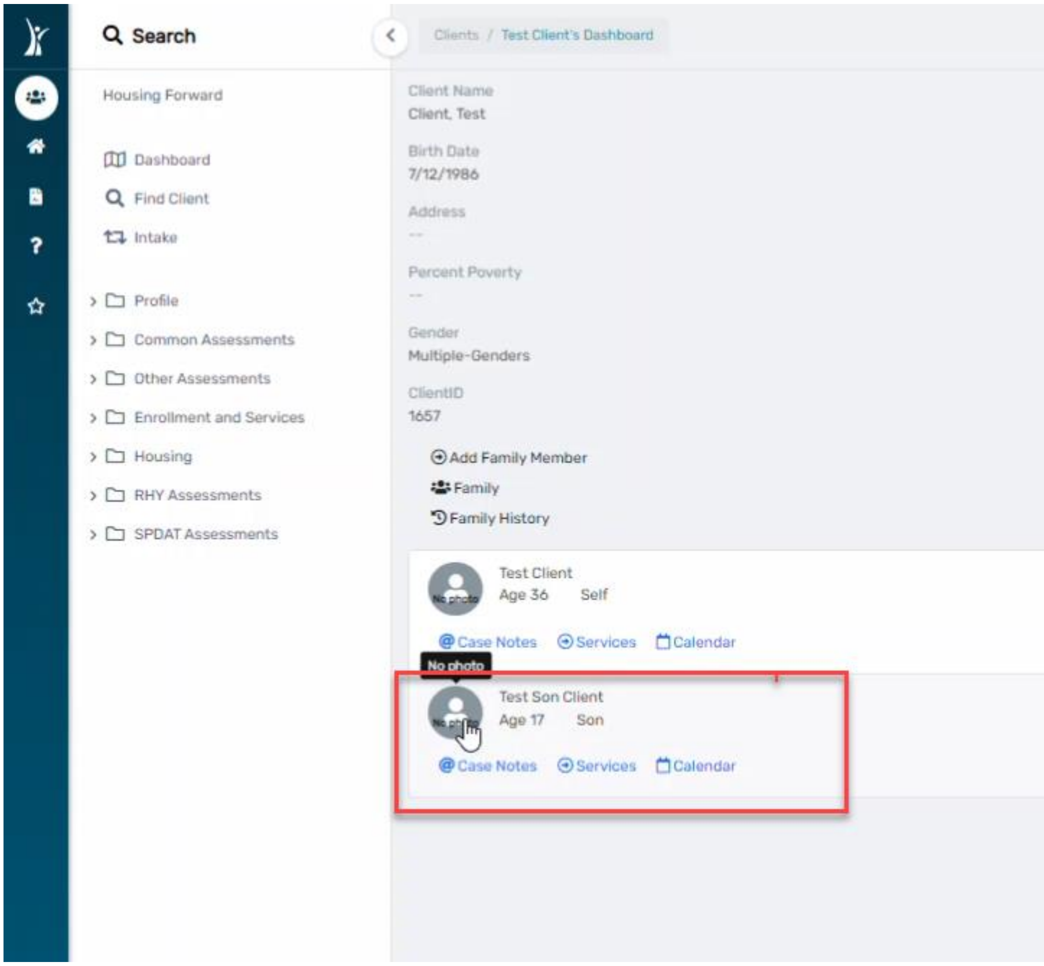
a. Searching for the Head of Household and selecting a family member.



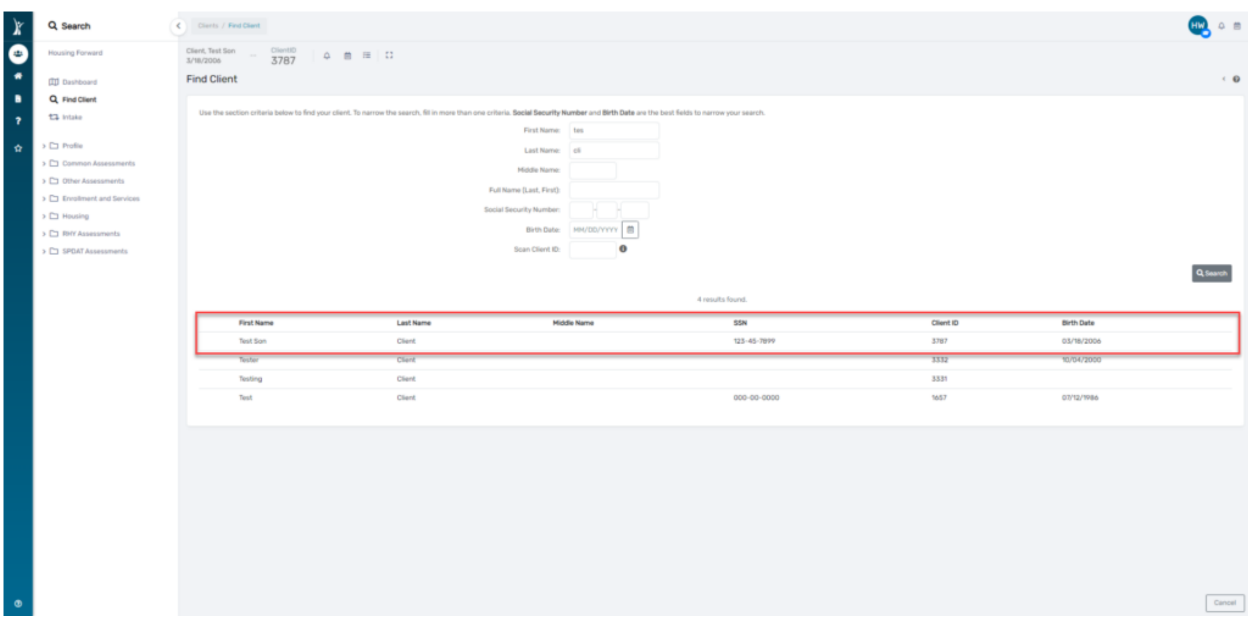
Search
Housing Forward
Find Client
First Name
Last Name
Middle Name
SSN
Client ID
Birth Date



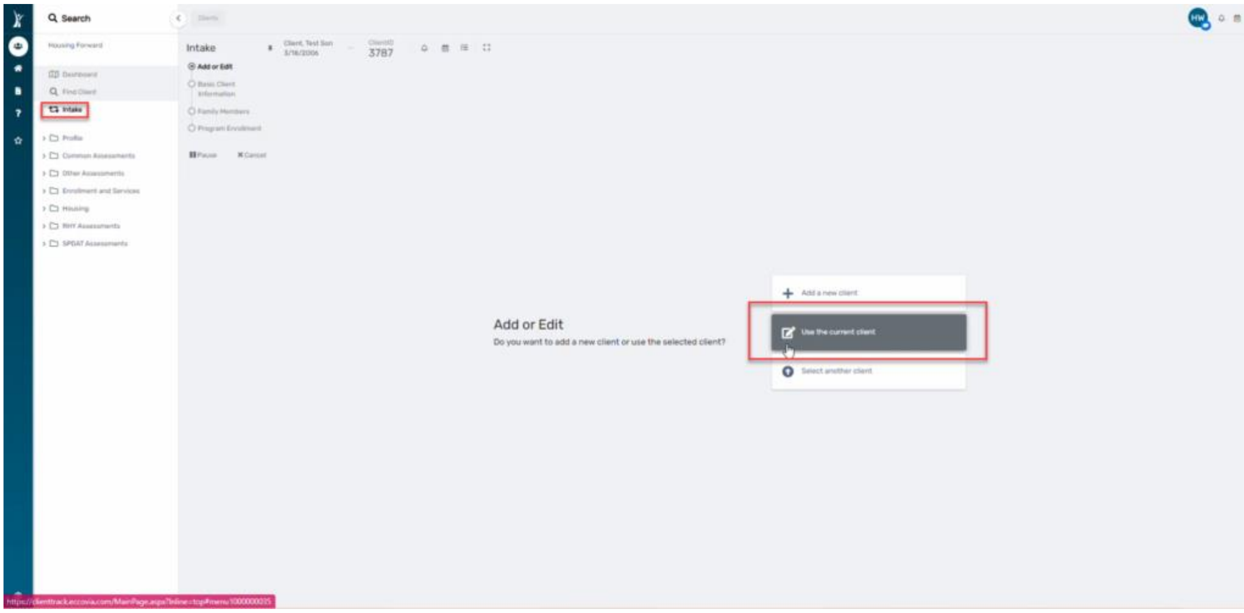
Search
Clients / Test Client's Dashboard
Expand
Housing Forward
Client, Test
7/12/1986
ClientID
1657
Dashboard
Find Client
Intake
Profile
Common Assessments
Other Assessments
Enrollment and Services
Housing
RHY Assessments
SPDAT Assessments
Test Client's Dashboard
Test Client's Information
Name:
Gender:
Ethnicity:
Test's Enrollments
Enrollment Description
Active Household Members
Active
Emergency Shelter
ASC - Emergency Shelter (E/E)
1
Adults



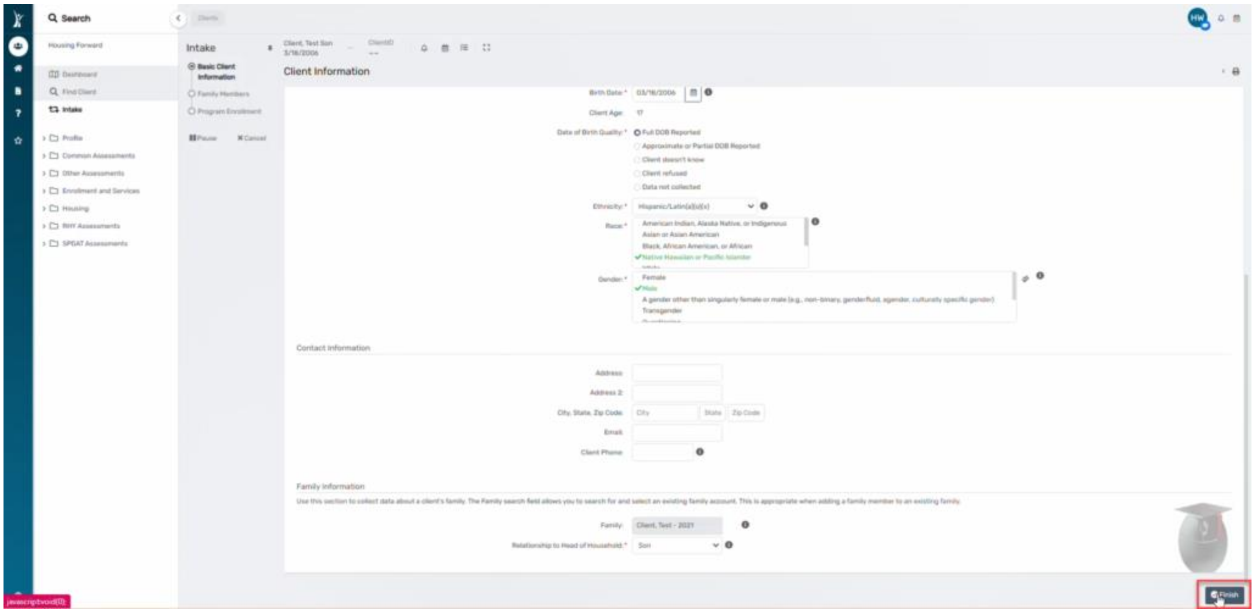
b. Searching directly for client.

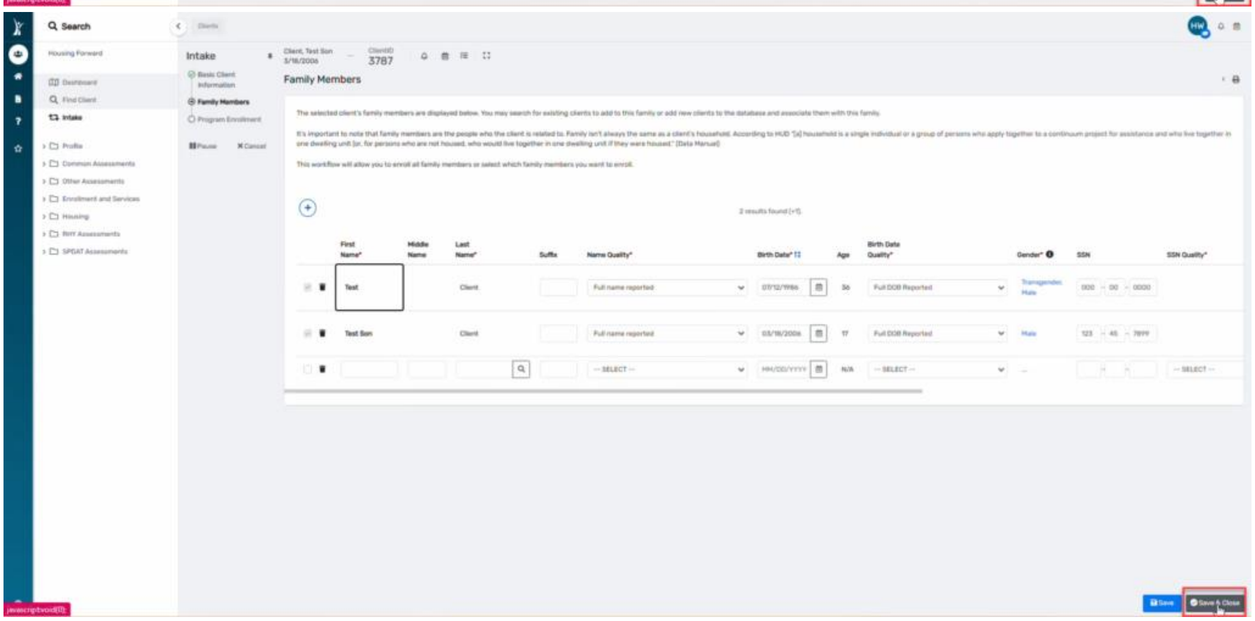


2. On the client's dashboard, click **Intake**. This will start a workflow. Click "**Use the Current Client**"



3. Continue through the pre-populated (from creation of client) client information, confirming as you go and changing if needed.

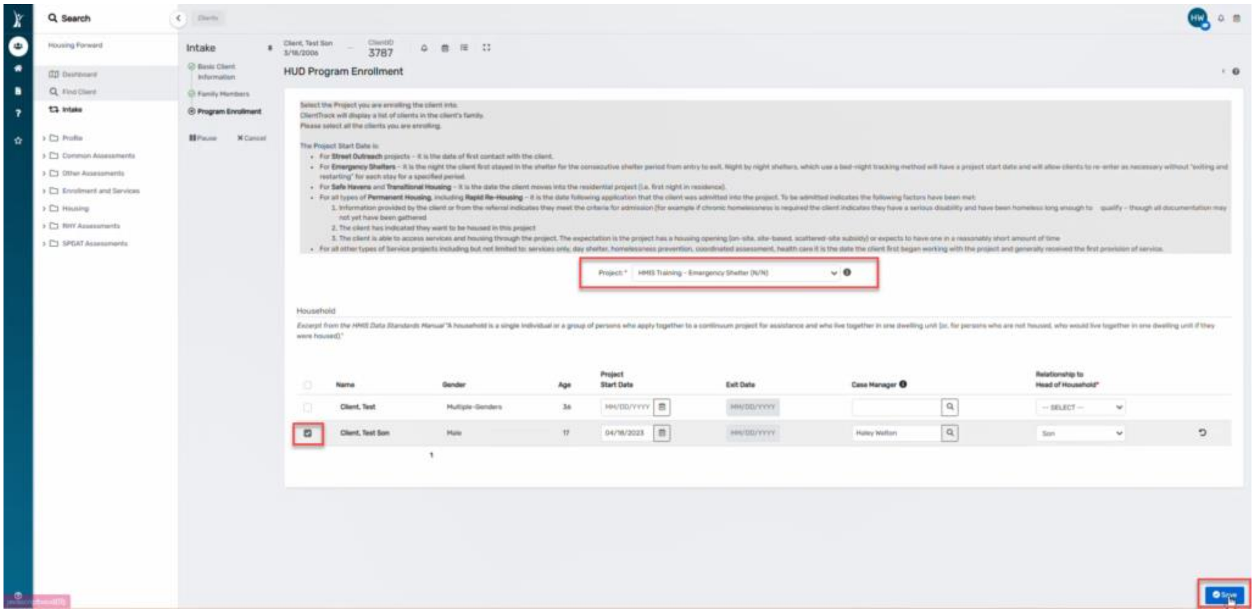




NOTE: All family members will appear on this screen because they are currently connected. Simply save and close.

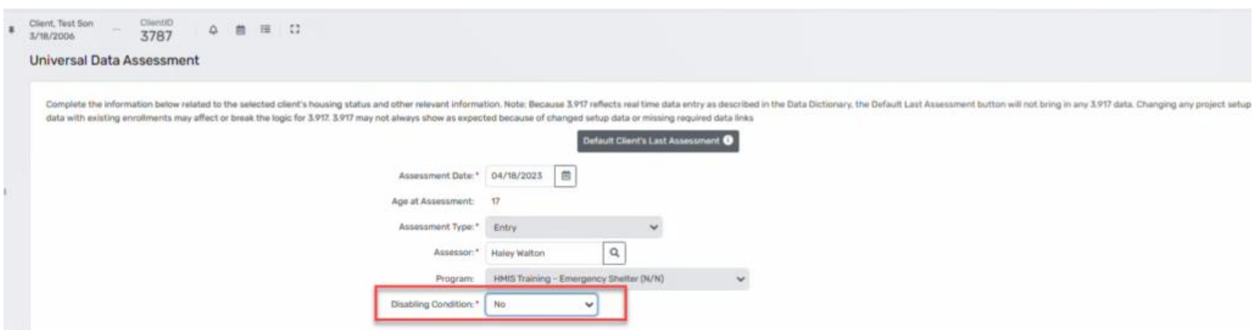
HUD Program Enrollment

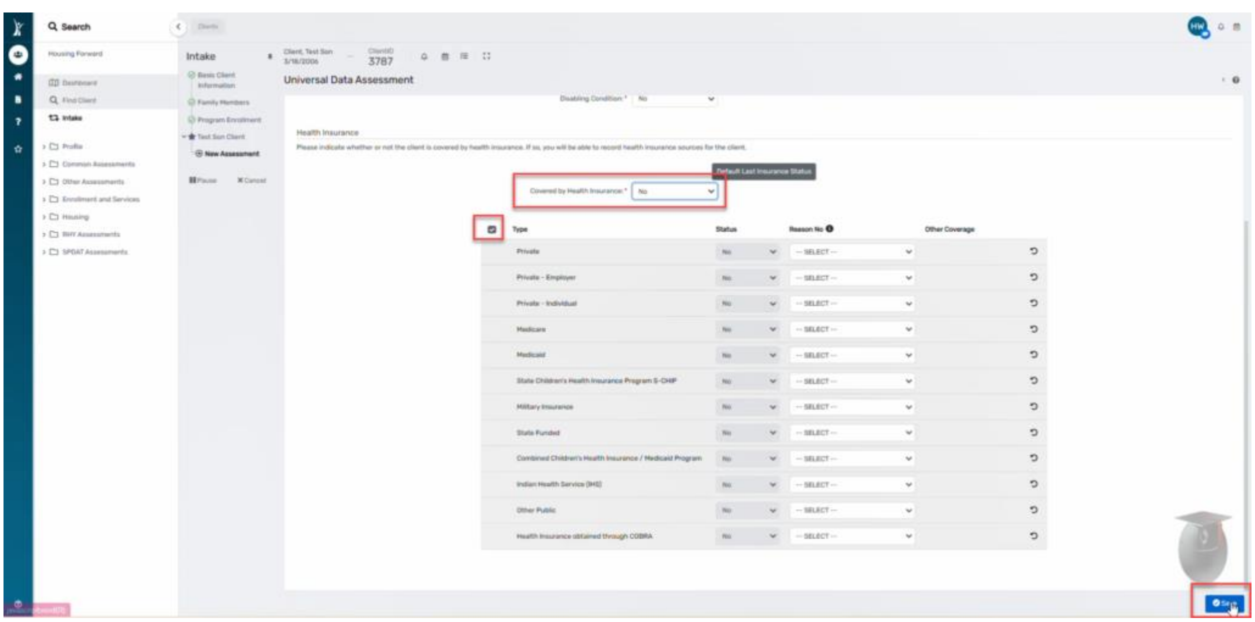
4. **Select the Project** for which the client will be enrolled in from the dropdown box. **Check the box** next to the family member you are enrolling.



Universal Data Assessment

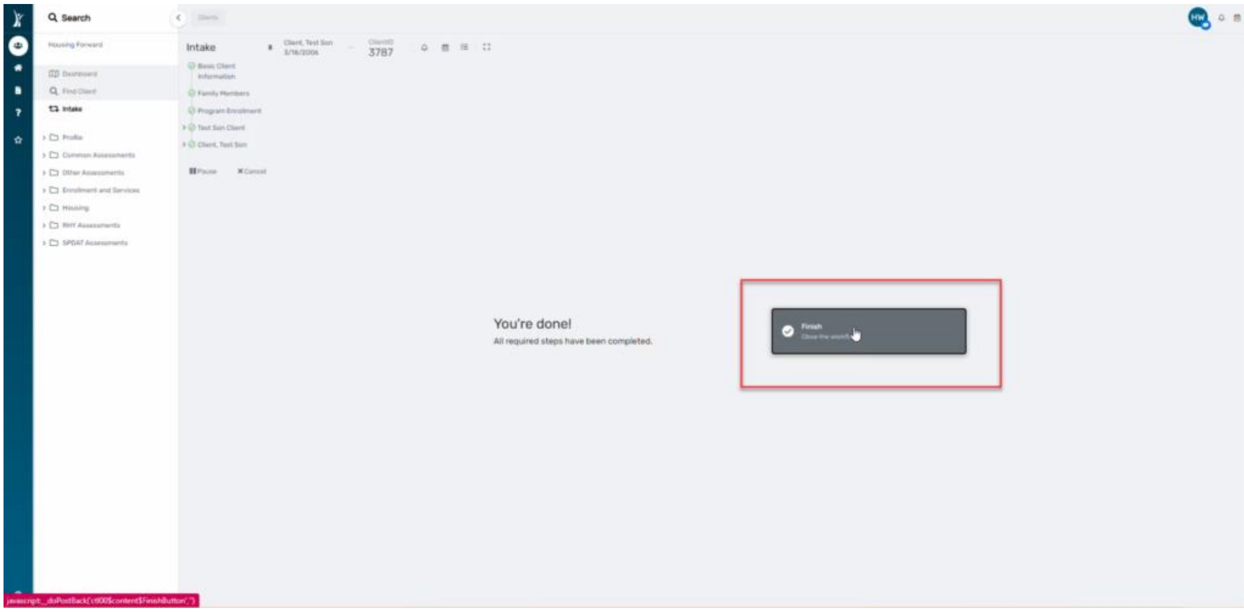
5. Record all information for the client.





6. Click **Save**.

7. You will come to the end of the workflow. Click **Finish**.



Confirm that you see the enrollment on the client's dashboard.