

Edit Entry Workflow

Introduction

Edits should be made to the workflow when data was recorded incorrectly and needs to be edited to be accurate.

Steps

1. Log in to ClientTrack and navigate to your **Client's Workspace**.
2. On the Client Dashboard, click the **action menu** next to the enrollment in question and choose **Edit Project Entry Workflow**.

test, hms

2/15/1989

ClientID

4



Name: test, hms

Gender: Female

Ethnicity: Non-Hispanic/Non-Latin@0000x

Birth Date: 2/15/1989

Race: American Indian, Alaska Native, or Indigenous, White

P Status

Age: 33

Veteran: No

VA SPDAT Score

hms's Enrollments

1 result found:

Enrollment Description	Active Household Members	Household Type	Project Start Date	Project End Date	Days Enrolled	Exit Destination	Last Assessed
Active Emergency Shelter ASC - Emergency Shelter (E/E) Add Household Member Add Housing Status Tracking Associated Assessments Exit the Enrollment Delete Enrollment Edit Enrollment Edit Project Entry Workflow Link Assessments Update/Annual Assessment							

2

Adults and Children

08/09/2022

2

8/9/2022

hms's Referrals

No records found:

Service	Units	\$ Total	Organization
	0.00	\$0.00	

3. You are now in the Entry Workflow. You only need to make changes on pages with incorrect information. You can click **No Changes** or **Save & Close** on any page where you do not need to make changes.

HUD Program Enrollment

- For **Street Outreach** projects - It is the date of first contact with the client.
- For **Emergency Shelters** - It is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night-by-night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without "leaving and re-starting" for each stay for a specified period.
- For **Safe Havens and Transitional Housing** - It is the date the client moves into the residential project (i.e. first night in residential).
- For all types of **Permanent Housing, including Rapid Re-Housing** - It is the date following application that the client was admitted into the project, to be admitted indicates the following factors have been met:
 - Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify - though all documentation may not yet have been gathered)
 - The client has indicated they want to be housed in this project
 - The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, off-site, 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: * ADC - Emergency Shelter (2/1)

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)."

☐	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*
☒	test_hms	Female	33	06/19/2022	MM/DD/YYYY	Halley Walton	Self
☒	test_july	Male	7	06/19/2022	MM/DD/YYYY	Halley Walton	Son

Buttons: Save, No Changes

NOTE: This is where you can correct the Project Start Date. However, if you edit this date, you will need to edit the Assessment Date on each subsequent page of the workflow, and the Master Assessment.

4. **Edit** any pages in the workflow that needs to be edited.

If you changed the project start date, check the dates on each of the pages in the rest of the workflow to be sure they match the project start date.

Examples of pages you may see in the workflow are shown below but are dependent on project type. The date of each assessment page is highlighted below for easy reference, but all information on these pages can be edited as needed.

Universal Data Assessment

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.XP7 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.XP7 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.XP7. 3.XP7 may not always show as expected because of changed setup date or missing required data flow.

Master Assessment Active: Change Assessment Daily

Default Client's Last Assessment

Universal Data Assessment * 06/19/2022

Information Date

Age while in project: 33

Assessment Type: Entry

Disabling Condition: Yes

Buttons: Pause, Cancel

Barriers/Special Needs

Intake

test, hmis

2/15/1989

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Basic Client Information

Family Members

Program Enrollment

test, hmis

Universal Data Assessment

Barriers / Special Needs

Domestic Violence

Income

test, July

Barriers

Use this form to identify whether a client has each individual barrier or not. The Clients last assessment is displayed as a default. You may, optionally, click [Previous Barriers Detail](#) to view information about the defaulted records or click [View Barrier History](#) to review all previous barriers.

Assessment Active

Identified Date: 08/09/2022

Screen: HMIS Barriers

Disabling Condition: Yes

[View Barrier History](#)

Domestic Violence Assessment

Intake

test, hmis

2/15/1989

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Basic Client Information

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test, hmis

Universal Data Assessment

Barriers / Special Needs

Domestic Violence

Income

test, July

Domestic Violence Assessment

If the client has been a victim of domestic violence, select Yes for Domestic Violence Experience, and select when the experience occurred.

Assessment Active

Assessment Date: 08/09/2022

Domestic Violence Experience: No

Income

If you edit the Income assessment date, you will also need to edit the Master Assessment date to ensure no reporting errors. See the Master Assessment section below for more details. You will receive an error alert if you need to complete this edit.

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Universal Data Assessment

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test, July

Income and Sources, Non-Cash Benefits

Indicate below the client's sources of **monthly** income, non-cash benefits and expenses.

Assessment Active

Assessment Date: 08/09/2022

Income from Any Source: No

Non-Cash Benefits from Any Source: No

Expenses: -- SELECT --

5. When you have edited all pages and clicked through the entire workflow, click **Finish** to close the workflow.

Intake

test, hmis
2/15/1989

ClientID
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✓ Basic Client Information

✓ Family Members

✓ Program Enrollment

> ✓ test, hmis

> ✓ test, July

⏏ Pause

✕ Cancel

You're done!
All required steps have been completed.

✓

Finish
Close the workflow

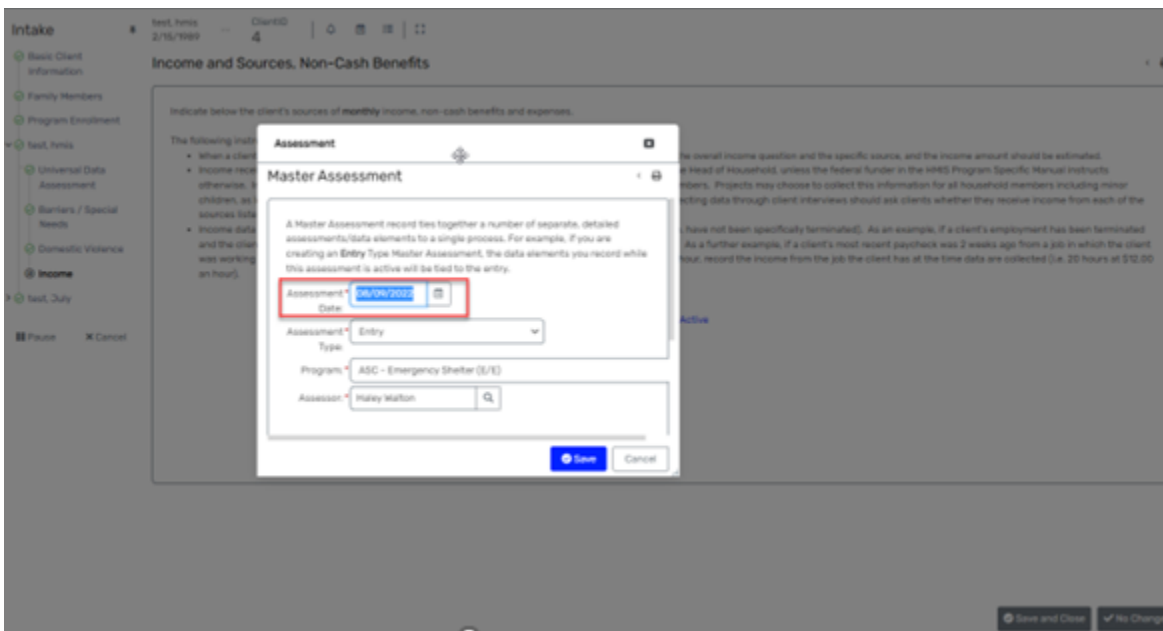
Edit Master Assessment

This edit will be required if you are editing the Project Start Date or the Income Assessment Date.

1. On any page of the workflow, click **Assessment Active** link (shown on Income page above in Step 5).
2. Click **Edit Assessment**.



3. Edit the **Assessment Date** to match the Project Start Date.



4. Click **Save**, then **Close** the Master Assessment popup box to go back to the workflow.