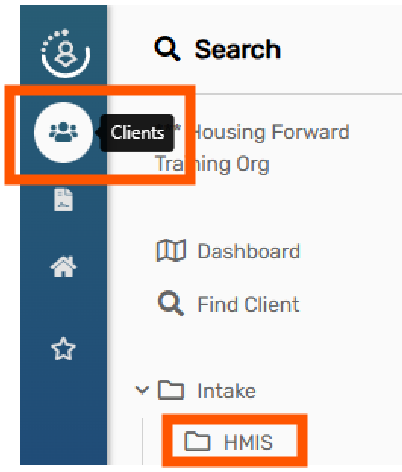
Create an Entry/Intake Assessment

Steps

Log in to ClientTrack and navigate to your Clients Workspace.

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

Click the Intake folder in the top left corner and select HMIS. This will start a workflow.



In this case, select **Add a new client**

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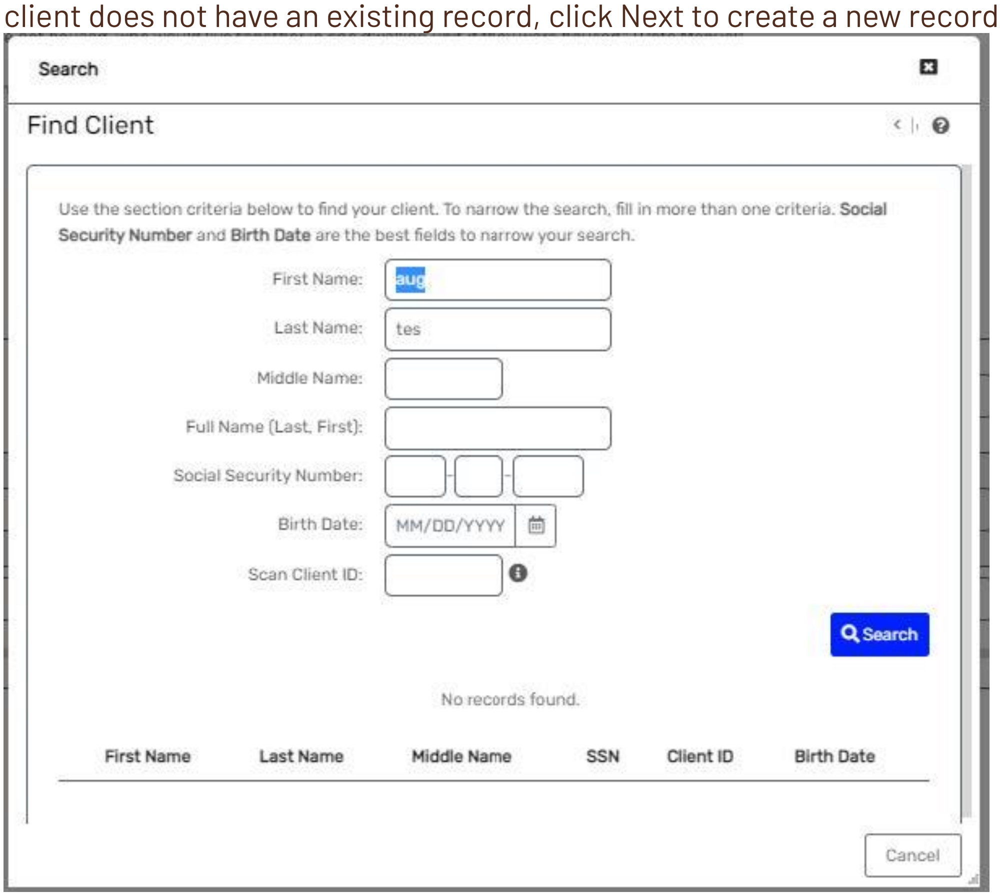
Enter ONLY the first three letters of the client's first name and the first three letters of the client's last name. This will search the system to see if the client has an existing HMIS record. Click Next in the bottom right corner.

The system will search to see if the client has an existing record. Be sure to select the existing record if the client returns in the search results. Doing so will add the enrollment to the existing record. If the client does not have an existing record, click Next to create a new record.

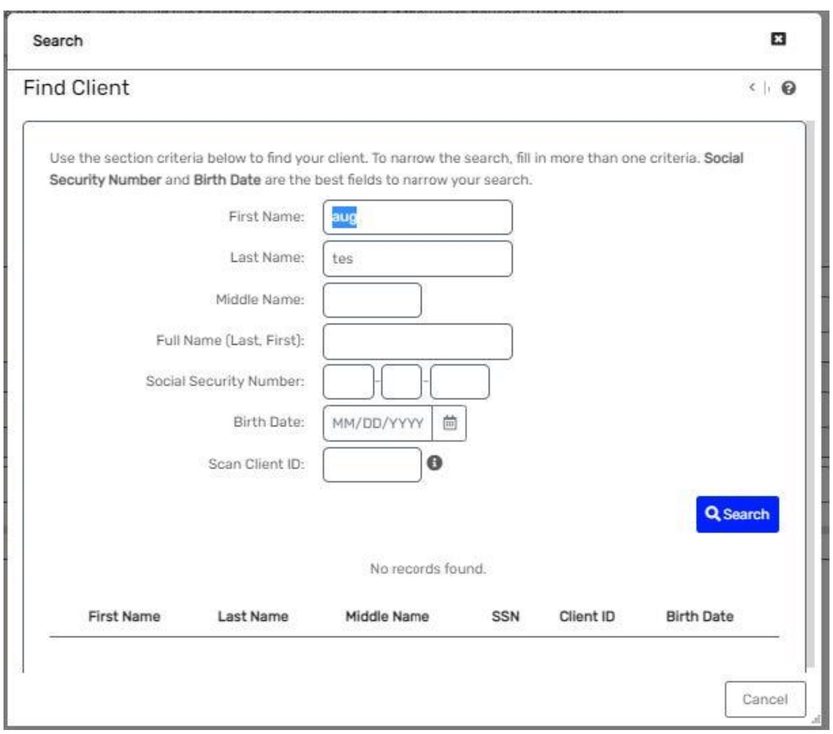


Continue to fill out the Basic Client Information screen and click Finish when done.

Family Members – This is the screen where all individuals within the family will be entered.

Starting with the first blank row, record ONLY the first three letters of the client's first name and the first three letters of the client's last name. Use the tab key or the magnifying glass. A Find Client screen will open.

Click the Search button to see if the client has an existing record. If so, be sure to click on that record to add that client to the enrollment workflow. If the client does not have an existing record, simply close the box.

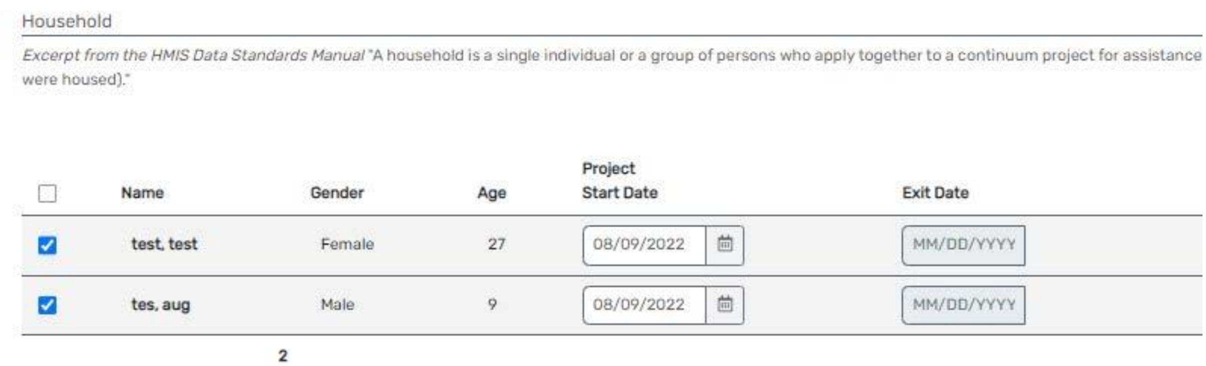


Record the client's full information.
Repeat this step for each family member.
Be sure each family member's name has a check mark for the name.
Click Save & Close.

HUD Program Enrollment

Select the Project for which the client will be enrolled in from the dropdown box.

Place a check mark next to all family members. Doing so will add each person to the enrollment and default the Project Start Date to today's date.

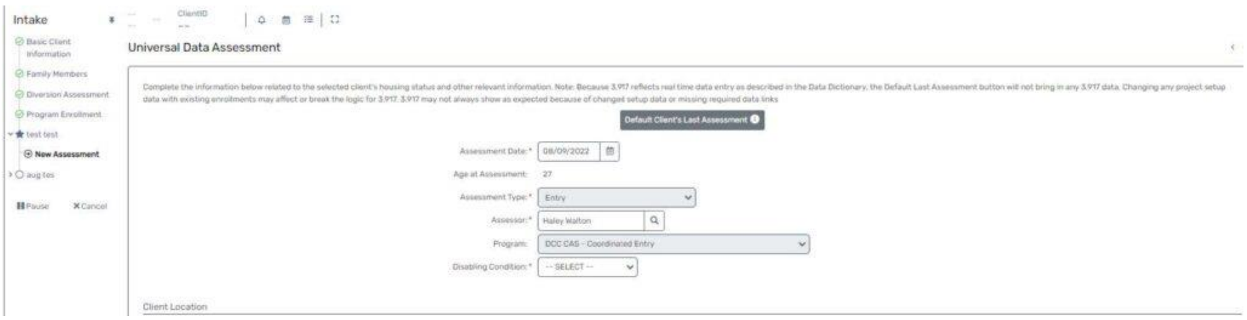


Confirm the Project Start Date. Make corrections if necessary. Outreach project types should record the Date of Engagement if necessary.
Click Save.

Universal Data Assessment

Record all information for the client. The Assessment date should be equal to the project start date.

Click Save.



Barriers

Record all information for the client. The Identified Date should be equal to the project start date.

Save & Close

Income and Sources, Non-Cash Benefits

Record all required information for the client. The Assessment date should be equal to the project start date.

Save & Close

Record all required assessment for each family member. You will come to the end of the workflow. Click Finish.