

Printing Forms

This cheat sheet includes information on the following:

- [Basic Printing Functions](#)
- [Printing Services](#)
- [Printing Entry and Exit Assessments](#)
- [Printing Case Notes](#)

Basic Printing Functions

1. To print forms in the system, look for the printing symbol in the right-hand corner of your screen. If you do NOT see the printing icon, then you cannot print that specific screen.

Client, Video

1/1/2000

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ClientID

9795

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🖨️

Enrollments

All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment updates.

10 results found.

Enrollment Description	Active Household Members	Household Type	Project Start Date ↕	Project Exit Date ↕	Days Enrolled	Exit Destination	Last Assessed	Enroll ID ↕
▼ Active								

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🗑️

🖨️

- Click on the print symbol, and the printable form page will pop up. Do NOT check the box next to "Break between each page." This page will show up every time you click on the print icon.

Printable Form

This page will display the form in a format more suitable for printing. You can choose to either print the data on the form or print a version of the form that blanks all the input fields and leaves a space for manual data entry.

In either case, the actual printing is left to the browser. You can choose whether or not you want to force a page break between each page of the form, but beyond that, the output is totally controlled by the browser. The output will likely *not* exactly match what you see here.

☐ Break between each page

Display as a blank form for manual input

Display the data in a format better suited for printing

- When you choose "Display as a blank form for manual input," you will be able to print the version of the form that blanks all the input fields and leaves a space for manual data entry.

Print

Basic Client Information

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name: _____
Last Name: _____
Middle Name: _____
Suffix: _____
Name Quality: * ☐ Full name reported
☐ Partial, street name, or code name reported
☐ Client doesn't know
☐ Client prefers not to answer
☐ Data not collected
Social Security Number: _____-_____-_____
SSN Quality: * ☐ Client doesn't know
☐ Client prefers not to answer
☐ Data not collected

- When you choose "Display the data in a format better suited for printing," you will be able to print the actual data on the form. You must print each page in the workflow separately.

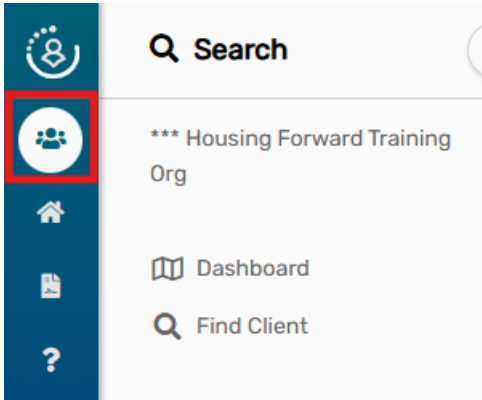
Basic Client Information

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

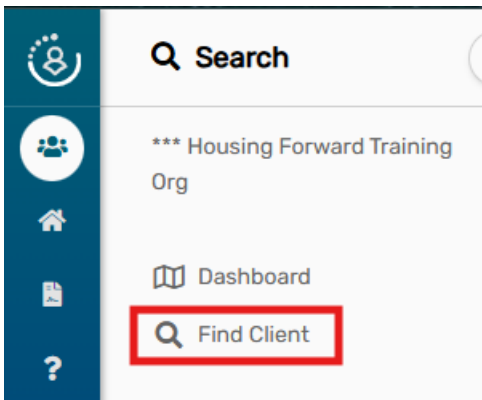
First Name: * Video
Last Name: * Client
Middle Name:
Suffix:
Name Quality: * Full name reported
Social Security Number: 423-34-5234
SSN Quality: * ☒ Full SSN
☐ Client doesn't know
☐ Client prefers not to answer
☐ Data not collected

Printing Services

1. When printing services, you must be on the "Clients" workspace. Click on the Clients icon and then the client dashboard will appear.



2. Find your client.



3. On your client's dashboard, scroll down to services and click on the edit pencil in the right-hand corner.

Video's Services

7 results found.

Organization	Service	Date	Units	\$ Total
▼ February 2026 (1 Services)				
*** Housing Forward Training Org	RHY - Community svc/svc learning (CSL) [TLP, MGH, Demo]	02/06/2026	1.00	\$0.00

4. You client services screen will appear. You can print the complete list of services for your client from this services home screen.

Client, Video 1/1/2000 -- ClientID 9795

Video Client's Services (ClientID 9795)

The client's service history displays below. To record a service, click **Add New Service**. To record multiple services, click **Quick Services**. To edit or view an existing service, click **Edit Service** next to the record.

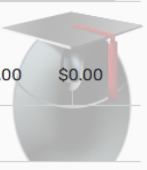
+ Add New Service **Quick Services** **Add CE Event**

Organization: -- SELECT --

Service: -- SELECT --

7 results found.

Organization	Service	Date	Units	\$ Total
▼ February 2026 (1 Services)				
  *** Housing Forward Training Org	RHY - Community svc/svc learning (CSL) [TLP, MGH, Demo]	02/06/2026	1.00	\$0.00
▼ December 2025 (1 Services)				
			7.00	\$0.00



Cancel

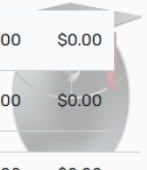
5. If you need to print services separately that include the comment section, click on the edit pencil next to the specific service you need to print.

Client, Video 1/1/2000 -- ClientID 9795

Video Client's Services (ClientID 9795)

7 results found.

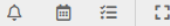
Organization	Service	Date	Units	\$ Total	
▼ February 2026 (1 Services)					
  *** Housing Forward Training Org	RHY - Community svc/svc learning (CSL) [TLP, MGH, Demo]	02/06/2026	1.00	\$0.00	
▼ December 2025 (1 Services)					
	* Housing Forward Lead Agency 2	PATH Svcs- substance use treatment	12/12/2025	1.00	\$0.00
▼ November 2025 (3 Services)					
	* Housing Forward Lead Agency 2	HOPWA FA-Utility payments (PHP and STRMU)	11/21/2025	1.00	\$0.00
	* Housing Forward Lead Agency 2	HOPWA Svc - Transportation	11/21/2025	1.00	\$0.00
			7.00	\$0.00	



6. The service screen will appear, and you will click on the print icon in the upper right-hand corner. Print your single service with your comments box.

Client, Video
1/1/2000

ClientID
9795



Service



Enter the information about the service provided to the client below.

Family Income:



Income	Family Income	Family Members	Poverty Level	% of Poverty
\$0.00	\$0.00	1	\$1,330.00	0.00 %

Enrollment: * 02/06/2026 - 02/06/2026 - TRAIN - HHS: RHY - Transitional Living Program

Grant: -- SELECT --

Service: * RHY - Community svc/svc learning (CSL) [TLP,MGH,Demo]

Location: New HMIS Support Hub

Date: * 02/06/2026



Service

Print

Enter the information about the service provided to the client below.

Family Income:

Income	Family Income	Family Members	Poverty Level	% of Poverty
\$0.00	\$0.00	1	\$1,330.00	0.00 %

Enrollment: * 02/06/2026 - 02/06/2026 - TRAIN - HHS: RHY - Transitional Living Program

Grant:

Service: * RHY - Community svc/svc learning (CSL) [TLP,MGH,Demo]

Location: New HMIS Support Hub

Date: * 02/06/2026

Units Of Measure: * ☐ Dollars
☐ Minutes
☒ Count
☐ Hours

Units: * 1.00

Unit Value: * \$0.00

Total: \$0.00

User Performing the Service: Emmett Altzman

Comments:

Printing Entry and Exit Assessments

1. To print the list of enrollments for your client, navigate to your client's dashboard and then scroll down to your client's enrollments section and click on the edit pencil in the right-hand corner.

Client, Video
1/1/2000

ClientID
9795



Video's Enrollments 

10 results found.

Enrollment Description	Active Household Members	Household Type	Project Start Date 	Project Exit Date 	Days Enrolled	Exit Destination	Last Assessed	Enroll ID 
▼ Active								
▼ PH - Permanent Supportive Housing (disability required for entry)								
... TRAIN - HUD: HOPWA - Permanent Housing (facility based or TBRA)	1	Adults Only	11/21/2025		109		11/21/2025	18670
... TRAIN - HUD: CoC - Permanent Supportive Housing	1	Adults Only	10/20/2025		141		10/20/2025	18477
▼ PH - Rapid Re-Housing								
... TRAIN - HUD: CoC - Rapid Re-Housing	1	Adults Only	10/09/2025		152		10/9/2025	18427

2. Click on the print icon in the upper right-hand corner of the enrollments screen.

Client, Video
1/1/2000

ClientID
9795



Enrollments 

All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment updates.

10 results found.

Enrollment Description	Active Household Members	Household Type	Project Start Date 	Project Exit Date 	Days Enrolled	Exit Destination	Last Assessed	Enroll ID 
▼ Active								
▼ PH - Permanent Supportive Housing (disability required for entry)								
... TRAIN - HUD: HOPWA - Permanent Housing (facility based or TBRA)	1	Adults Only	11/21/2025		109		11/21/2025	18670

3. To print Entry and Exit Assessments, go to your client's dashboard, scroll down to your client enrollments section and click on the three dots to the left of your enrollment. Choose "Edit Project Entry Workflow" to print out the Entry Assessment and choose "Edit Exit Workflow" to print out the Exit Assessment. You MUST print each page separately by clicking on the print icon in the upper right-hand corner of each screen. As you move through the workflow, you can select "no changes" or "save and close" on each screen.

Client, Video
1/1/2000

ClientID
9795

Enrollments

10 results found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Project Exit Date	Days Enrolled	Exit Destination	Last Assessed	Enroll ID
▼ Exited								
▼ Emergency Shelter - Entry Exit								
⋮ TRAIN - HHS: RHY - Basic Center	0	Adults Only	02/06/2026	03/04/2026	26	Place not meant for habit...	3/4/2026	18775
➤ Add Household Member								
➤ Add Housing Status Tracking								
➤ Associated Assessments								
➤ Missed Annual/Update Assessment	0	Adults Only	10/28/2025	03/04/2026	127	Place not meant for habit...	3/4/2026	18579
➤ Edit Project Entry Workflow								
➤ Edit Exit Workflow								
➤ Link Assessments								
➤ Review Entry Assessments								
➤ Review Exit Assessments	0	Adults Only	10/23/2025	10/24/2025	1	Staying or living with fa...	10/24/2025	18560
➤ RHY Aftercare								

Cancel

Intake

Client, Video
1/1/2000

ClientID
9795

Client Information

Basic Client Information ⓘ

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name: *

Video

Last Name: *

Client

Middle Name:

Suffix:

Name Quality: *

Full name reported

ⓘ

Social Security Number:

423 - 34 - 5234 ⓘ

SSN Quality: *

☒ Full SSN

☐ Client doesn't know

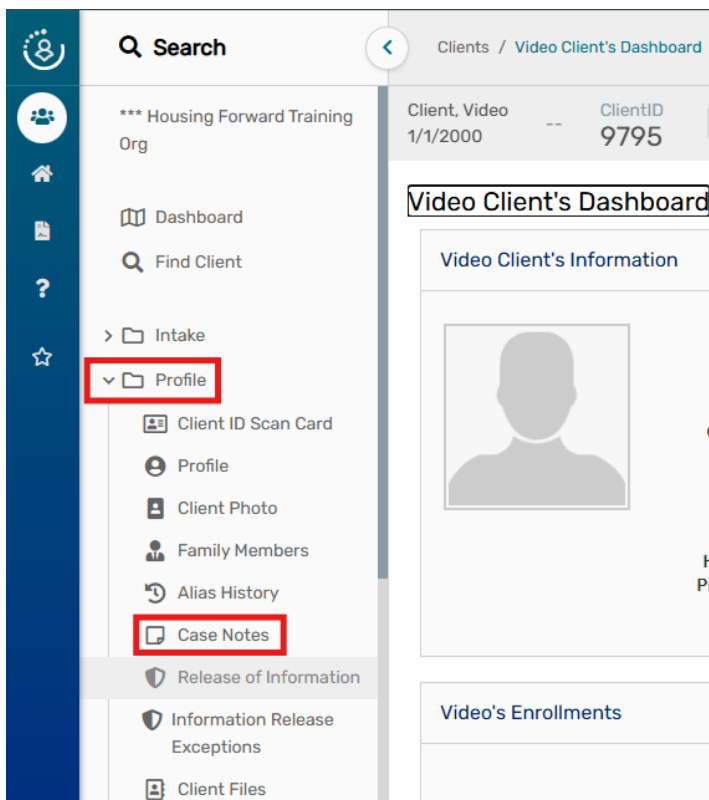


✓ Finish

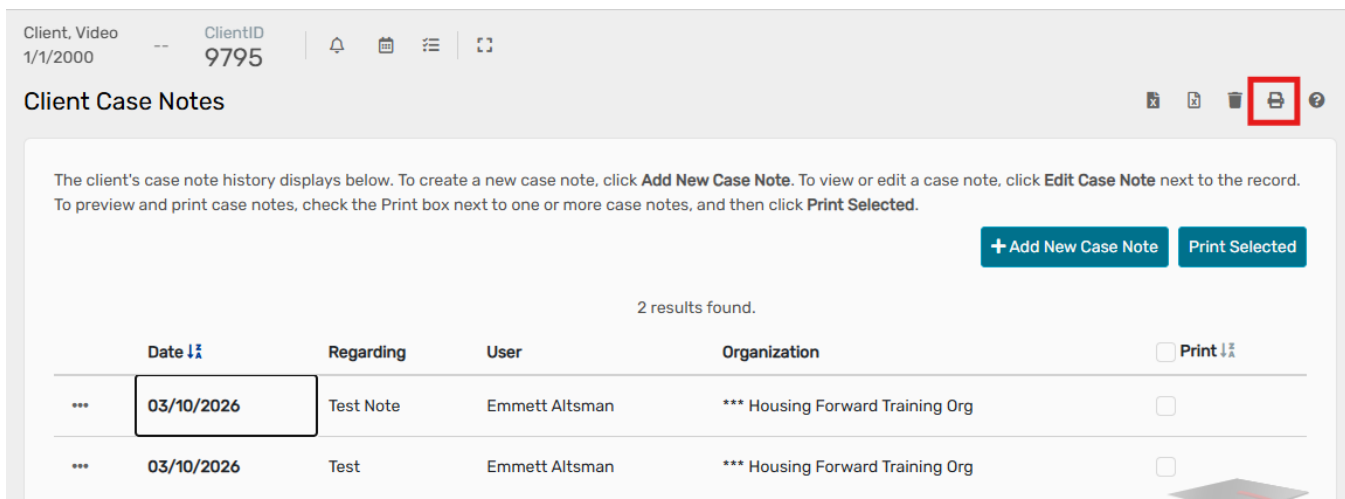
✓ No Changes

Printing Case Notes

1. From the client's dashboard, in the left-hand menu, click on "Profile" and then "Case Notes."



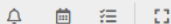
2. Your client's case notes screen will appear. You can print the case note history without the case notes by clicking on the print icon in the upper right-hand corner.



3. You can print the full case notes by checking the box next Print. Checking this box will allow you to print all case notes. If you need to print only certain case notes, check the boxes next to each case note you want to print; then, click on "Print Selected" to print the notes.

Client: Video
1/1/2000

-- ClientID
9795



Client Case Notes



The client's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the Print box next to one or more case notes, and then click **Print Selected**.

+ Add New Case Note

Print Selected

2 results found.

	Date	Regarding	User	Organization	☒ Print
***	03/10/2026	Test Note	Emmett Altzman	*** Housing Forward Training Org	☒
***	03/10/2026	Test	Emmett Altzman	*** Housing Forward Training Org	☒