

How to Change the Enrollment Date and/or Exit Date

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

PLEASE NOTE: IF THE CLIENT HAS BEEN EXITED FROM THE PROJECT AND 90 DAYS HAVE PASSED SINCE THE EXIT DATE, THE SYSTEM WILL NOT ALLOW YOU TO EDIT THE PROJECT START DATE OR PROJECT EXIT DATE.

Editing the Enrollment Date

1. Login into ClientTrack and **click on the loop icon to find a client** as shown below and type in the first couple of letters of the client's first and last name and/or any other personal identifiable information available such as date of birth or social security number. Then click **"Search"**. You will see a list of clients display on the screen; **click next to the name of the client you want to edit** as shown by the red arrow below.

Home > Clients / ClientTrack Form

Chewy Bear 10/19/2014 Social Security Number 466-32-7282 Client ID 1048319

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:

Client ID:

Search

12 results found.

First Name	Last Name	Middle Name	SSN	Birth Date	Client ID
Chewy	Bear		XXX-XX-7282	10/19/2014	1048319

- Go to the head of household's client record and **click on the three dots** next to the enrollment you wish to edit found on the client dashboard under "[Client name] Enrollments". From the drop-down menu, select **"Edit Enrollment"** as shown below.

The screenshot shows the 'Client Dashboard' for Chewy Bear. At the top, client information is displayed: Name (Chewy Bear), Social Security Number (466-32-7282), and Client ID (1048319). Below this, a section titled 'Chewy's Enrollments' shows a table with 2 results. The first enrollment is 'My Fake Organization CoC RRH (RRH-...)' with 2 case members and a start date of 09/06/2022. A red box highlights the three-dot menu icon next to this enrollment. A dropdown menu is open, and the 'Edit Enrollment' option is highlighted with another red box. Other options in the menu include 'Add Household Member', 'View Case Members', 'Exit the Enrollment', 'Edit Project Entry Workflow', 'Review Entry Assessments', and 'Update/Annual Assessment'.

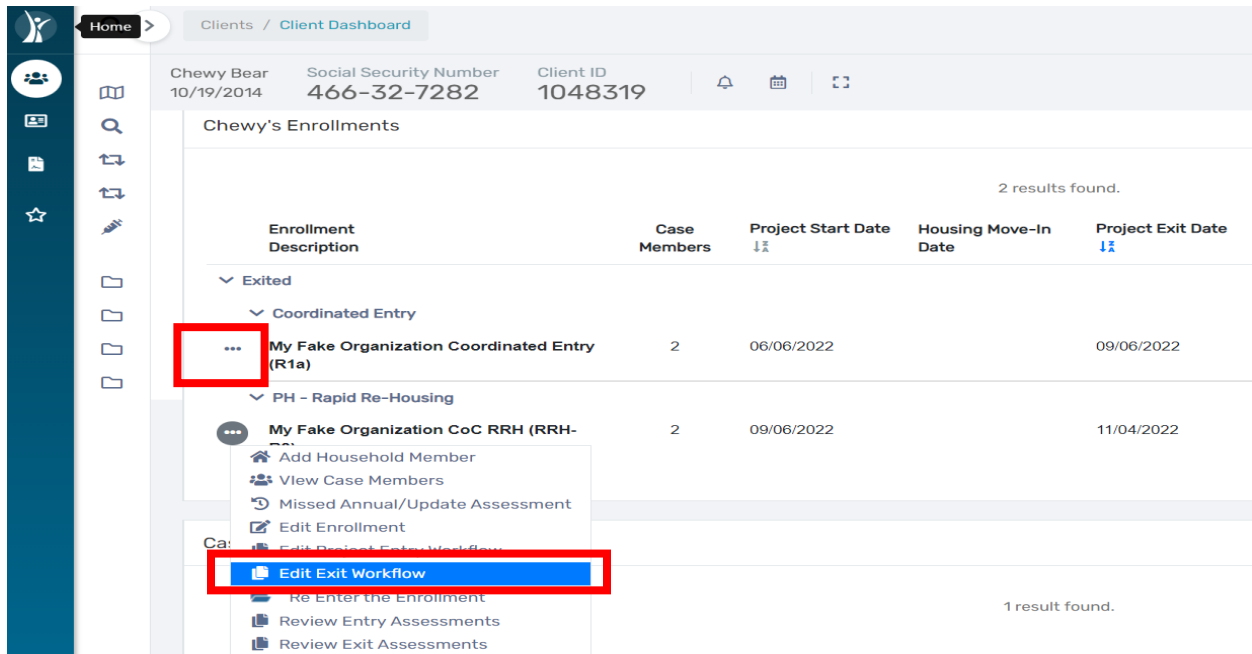
- Edit the enrollment date in the box labeled **"Start Date"** as shown in the image below. Finally, click **"Save"** at the bottom right-corner of the screen.

The screenshot shows the 'ClientTrack Form' for the same client. The form displays details for the enrollment: Case (Bear, Gummy), Project (My Fake Organization CoC RRH (RRH-R8)), Enrollee (Bear, Chewy), and Relationship to HoH (Son). The 'Start Date' field is highlighted with a red box and contains the date '09/06/2022'. Below the 'Start Date' field is the 'Exit Date' field, which is currently empty and labeled 'MM/DD/YYYY'. At the bottom left, there are buttons for '+ Family Member' and 'Exit Enrollment'.

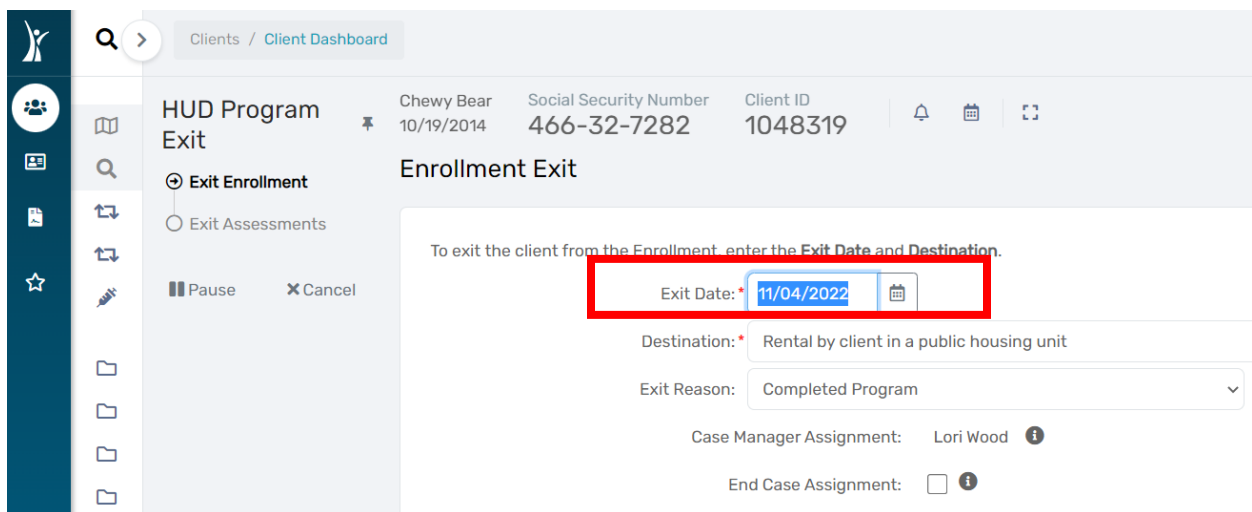
Editing the Project Exit Date

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 step 1.
2. Go to the head of household's client record and **click on three dots next to the enrollment** you wish to edit found on the client dashboard under "[Client name] Enrollments" shown in the image below. Once the drop-down menu appears, click on **"Edit Exit Workflow"**.



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



Please contact your respective helpdesk for additional assistance. HMISHelpDesk@ihcda.IN.gov or DVHelpDesk@ihcda.IN.gov