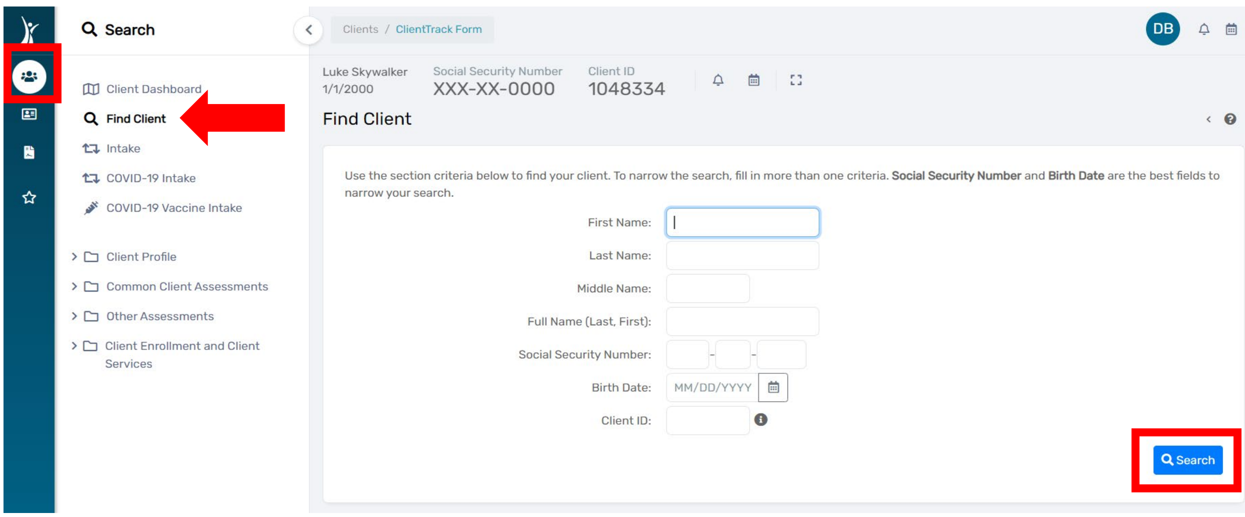
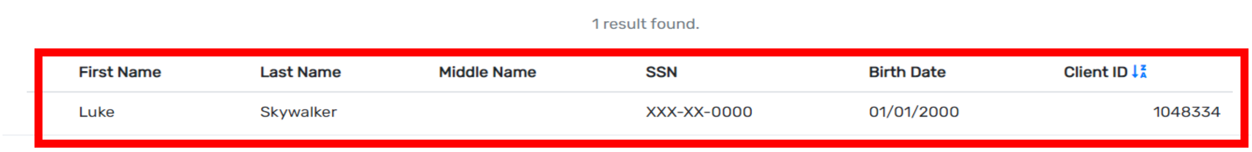
How to Guide

Entering the “Housing Move in Date” for RRH and/or PSH Enrollments in HMIS and DV ClientTrack

1. Select the **“Clients”** icon in the upper left corner, then click on “**Find Client”** to locate your client’s record. Type the first few letters of your client’s first and last name before clicking on the **“Search”** button to find the client. You can also enter date of birth and/or social security number to look for your client. Next, click on the client’s name to go to your client’s **“Client Dashboard”.**

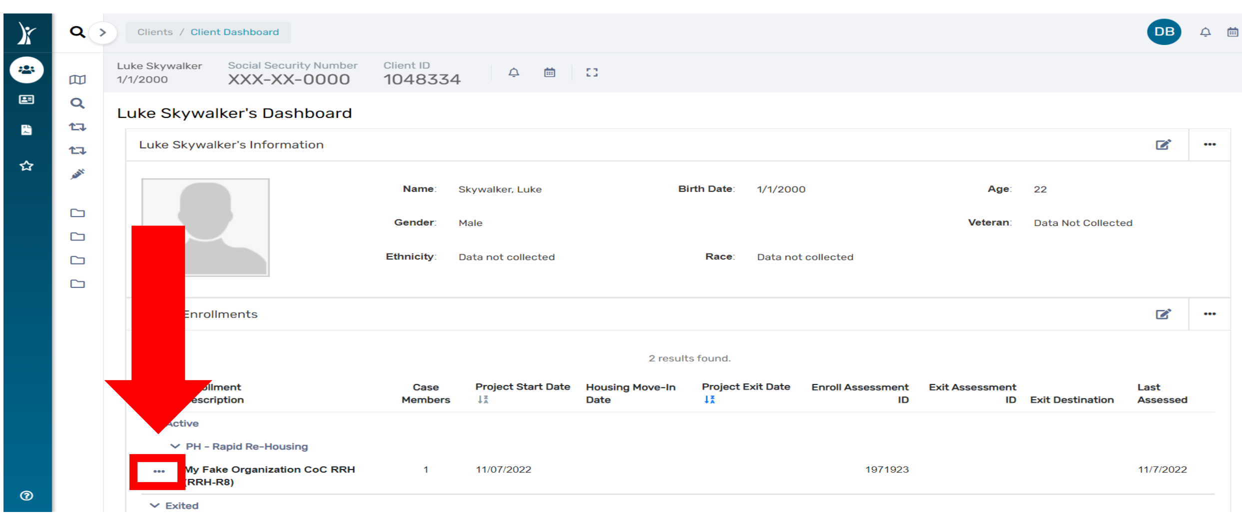




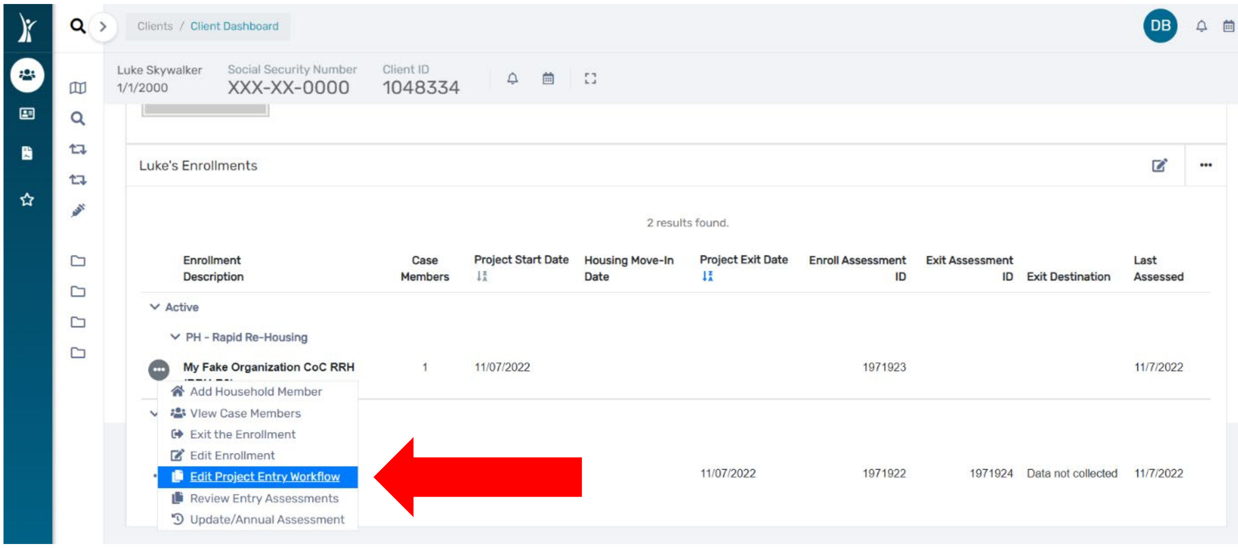
1 result found.

First Name	Last Name	Middle Name	SSN	Birth Date	Client ID
Luke	Skywalker		XXX-XX-0000	01/01/2000	1048334

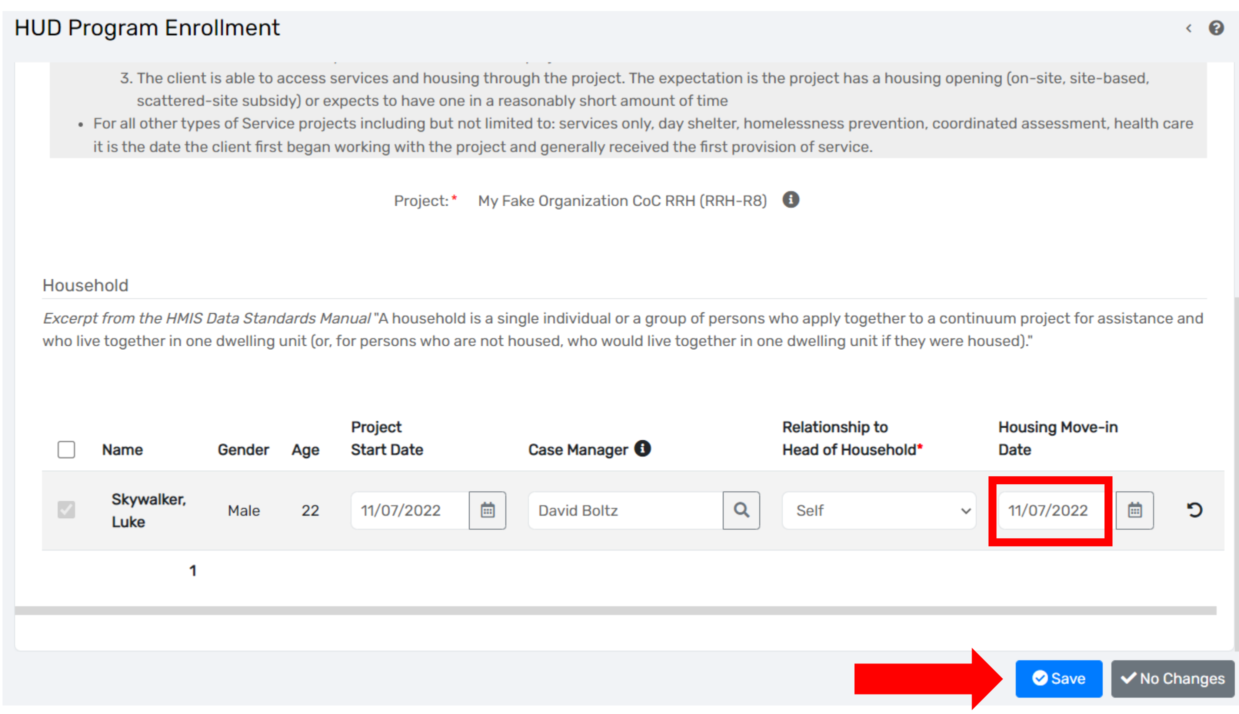
2. Click on the three dots located to the left of the open enrollment.



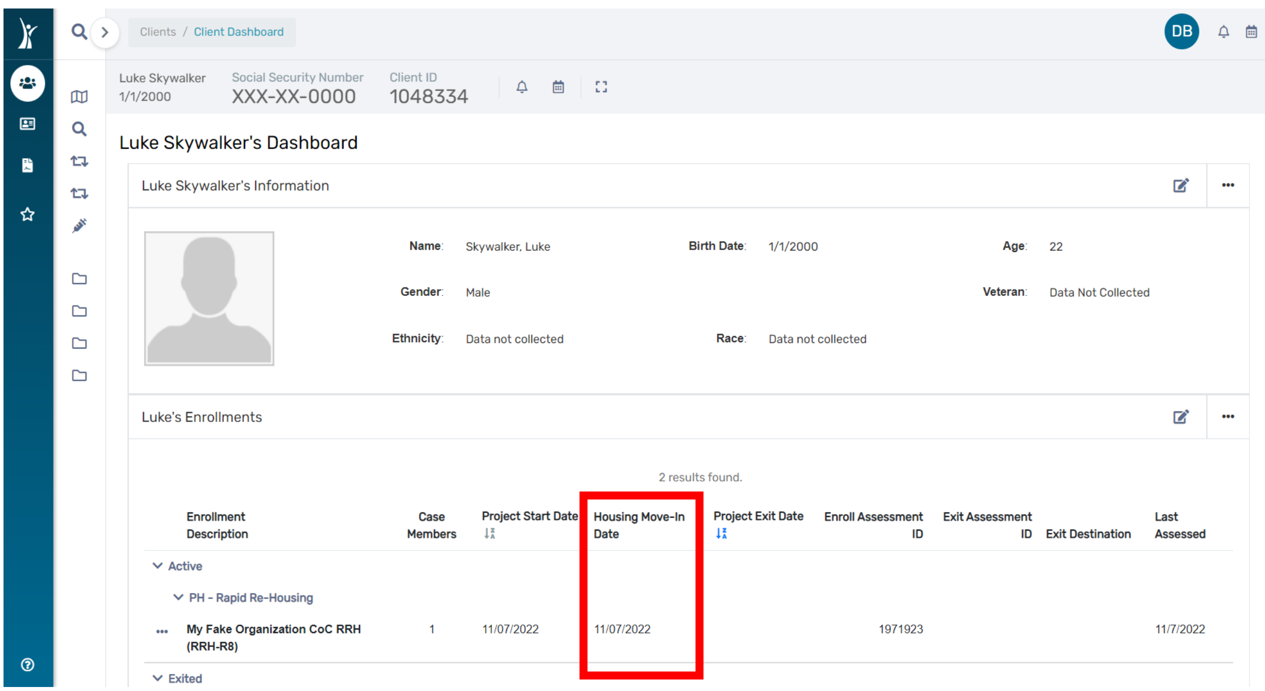
3. Click on **"Edit Project Entry Workflow"**



4. The workflow will launch.
   a. On the **"Basic Client Information"** Assessment click **"No Changes"** in the bottom right corner of the screen.
   b. On the **"Family Members"** Assessment click **"Save and Close"** in the bottom right corner of the screen.
   c. On the **"HUD Program Enrollment"** Assessment complete the **"Housing Move in Date"** field (Head of Household only) then click **"Save"** in the bottom right corner of the screen.



5. Click **"Save"** on the "Universal Data" Assessment.
6. Click **"Save and Close"** on the "Barriers" Assessment.
7. Click **"No Changes"** on the **"Domestic Violence"** Assessment.
8. Click **"No Changes"** on the **"Income and Sources/Non-Cash Benefits"** Assessment.
9. Continue through the **"Edit Project Entry Enrollment"** workflow for each family member by clicking **"No Changes"**, **"Save"** or **"Save and Close"** on every Assessment for each family member. ***NOTE:** When the option is **"Save"** or **"Save and Close"**, click **"Save and Close"** to advance the workflow.*
10. To **"Finish"** the **"Edit Project Entry Enrollment"** workflow you must click on the **"Finish"** box to complete the workflow.
11. After clicking **"Finish"** you will be returned to the Client's Dashboard and the **"Housing Move in Date"** will appear on the enrollment for the RRH project.



For questions on this process in DV ClientTrack, please submit a ticket to the DVHelpDesk@ihcda.IN.gov

For questions on this process in HMIS, please submit a ticket to the HMISHelpDesk@ihcda.IN.gov