Enrolling Clients in a Program

In this Job Aid

What are Programs?

When a community organization chooses to participate in a Homeless Management Information System (HMIS), the system administrators gather information about the services being provided to clients experiencing homelessness or at risk for homelessness and create an HMIS program. This provides a structure for HMIS End Users to identify which clients they are working with and what services they are providing them. Each client must be enrolled in the program and have services logged within that enrollment to track the client's history. When an organization stops working with a client, that client must be exited from the program.

Is the Client in HMIS?

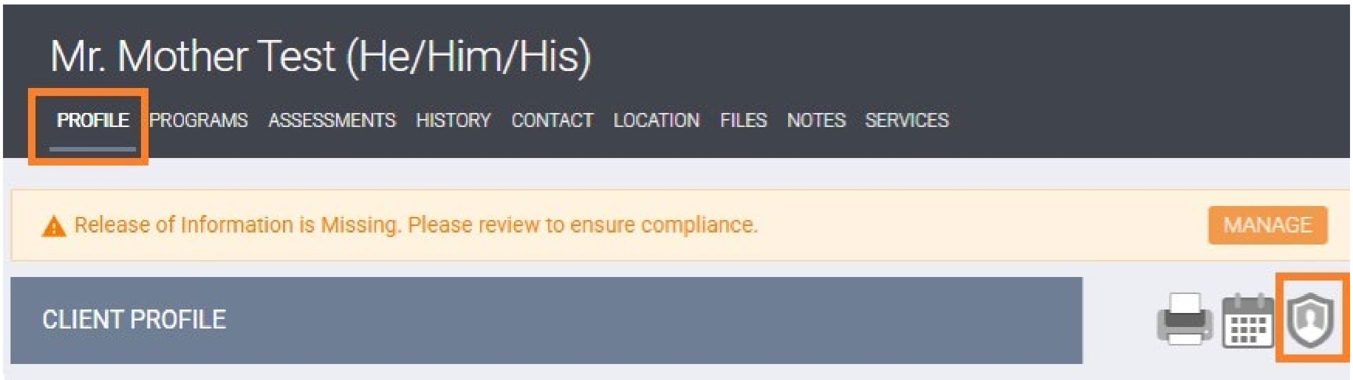
Before you can enroll a client in a program, they must be present in HMIS. Each client has one global profile, which may be accessed by many different organizations as the client receives services over time. If the client doesn't have a global profile, you will have to create one. Each client, including children, must have their own global profile. For more information on how to create a global profile, please see the Creating a New Client Profile job aid.

Before Enrolling a Client into a Program

When you are ready to enroll a client into a program, there are a few steps to take to ensure that the client's data is accurate and complete. These include confirming that the HMIS client consent documents are up to date, confirming and potentially correcting the client's global profile data, and reviewing the client's program history.

Check for a Valid Release of Information (ROI)

To protect the client's right to consent, make sure they have an active and valid Release of Information (ROI). To do so, you will go to their global profile screen and click on the Privacy Shield on the right side of the screen. If the client doesn't have an active ROI, you will see a banner across the top of the screen that directs you to review their ROI.
Do not ignore this banner.



The client's ROI confirms that the client has given permission to have their information shared between agencies in HMIS. **If the client does not have an active ROI, you must address this issue before enrolling the client in your program.** Once you have spoken to the client and obtained a new ROI, you can proceed with your program enrollment.
If the client does not want their information shared between agencies, you will need to take additional steps to protect their personal data before completing a program enrollment. For more information about ROIs, please review the Client Consent / ROI Job Aids on the HMIS Job Aids web page or contact the HMIS team for more assistance.

Review the Client's Global Profile Page

All HMIS users enrolling a client into a program are responsible for verifying that the information on the client's global profile page is present and correct. Review the information with the clients directly to verify that it is accurate and up to date. Please pay extra attention to any of the following answers:

- **Approximate or Partial data element recorded**: This is predominantly used to indicate that the user is inputting incomplete or for the most basic data elements like the client's name or social security number. If possible, please get an accurate answer to these questions. Note: If the client's name is the same as their UID or the profile otherwise shows that they may be anonymized in the system, please see the section below on anonymized clients.

- **Select**: This means that the question was not on this screen when the client's global profile was originally completed. Please obtain this information.

- **Client Doesn't Know** – If the client didn't know this information when their global profile was originally completed, they may know it now. Please do your best to obtain this information. This answer will not block you from saving this profile, but it does create data quality errors for federal reporting.

- **Client Prefers Not to Answer** - If the client didn't want to share this information when their global profile was originally completed, they may be willing to share it now. Please do your best to obtain this information. This answer will not block you from saving this profile, but it does create data quality errors for federal reporting.
- **Data Not Collected** – The previous user did not ask the client these questions and did not collect this information. Please obtain this information from the client.

Note: You may find a field where data elements were retired. While these questions have now been replaced on the global profile with more comprehensive questions, they cannot be removed from profiles already created. You can disregard these questions.

Anonymized Clients – What Data Should Be Recorded

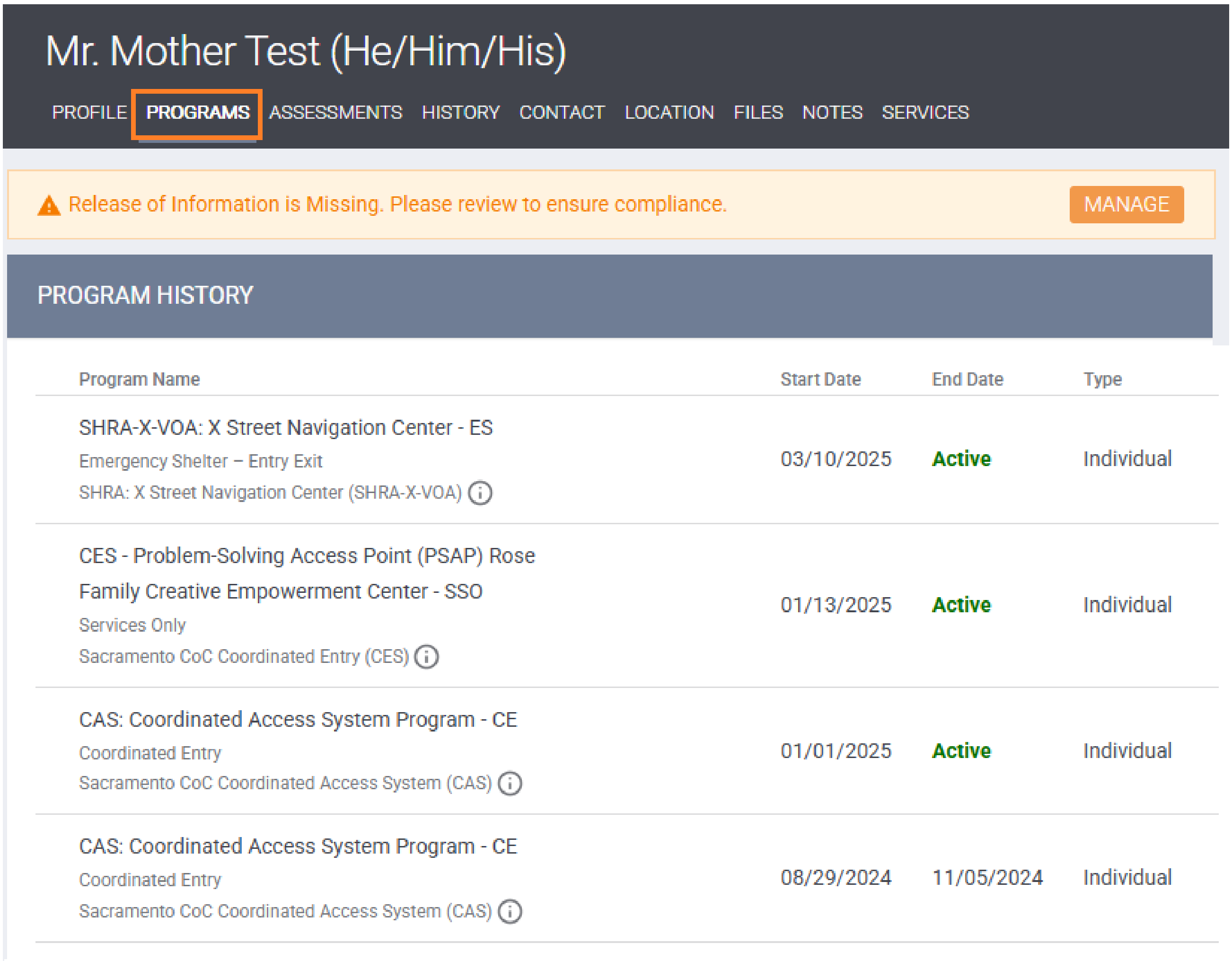
If the client's name is the same as their UID and their last name is anonymous, the client's account has been anonymized, so their data is not able to be linked directly back to this individual. You will most likely be aware of this when you are working with your client. Most of the data elements on this page still need to be collected accurately and completely. For more information on what should stay anonymized and what information should be collected, please see the Anonymize a Client Job Aid.

Working with Survivors of Domestic Violence

If your program serves survivors of domestic violence, dating violence, sexual assault, stalking, or other life-threatening conditions, you should not be entering their information into our main HMIS database. Please contact the HMIS team for further directions.

Review the Program History

To avoid overlapping enrollment errors and ensure you can enroll the client, you will need to visit the client's program tab. Once you are in the tab, you will see a history of all program enrollments for this client. As you can see in the image below, the client has been enrolled in four programs and three of them are active. In this example, the client was enrolled in the CAS Coordinated Access System Program twice, once in 2024 and again starting on 1/1/2025. Since that most recent enrollment, the client has also received services from a PSAP program and has been in an Emergency Shelter since March 10, 2025 to present. These program enrollments provide a narrative of the client's homeless services and allow you to understand more about where your work with the client fits into their journey towards housing stability.



Also note, the missing ROI banner shows up on every tab of the client's profile, ensuring that all users know there is a need to resolve the client's ROI.

Accurately reading the information from the program history is essential to understanding who the client has been working with. Let's discuss the different elements in the image below:

Program Name	Start Date	End Date	Type
SHRA-X-VOA: X Street Navigation Center - ES Emergency Shelter – Entry Exit SHRA: X Street Navigation Center (SHRA-X-VOA)	03/10/2025	Active	Individual

- The first line shows the name of the program the client is enrolled in. In this case, it is the SHRA-X-VOA: X Street Navigation Center – ES.
- On the second line, it tells you what kind of program it is. In this case, it is an Emergency Shelter – Entry Exit program. The "ES" at the end of the program title refers to the program type.
- Beneath that is the name of the agency that houses this program. In this case, it is a partnership agency between the Sacramento Housing and Redevelopment Agency (SHRA) and Volunteers of America (VOA).
- To the right we see the client's enrollment date and exit date. In this case, the client hasn't exited yet, so instead it says "Active".
- This client is enrolled alone, so they have an individual enrollment. If they were enrolled with other household members, it would be a group enrollment.

Answer these Two Questions

When reviewing the client's program history, we recommend that you answer these two questions:

Is this client already enrolled in your program? Sometimes another staff member has enrolled the client, or the client was previously enrolled and never exited.

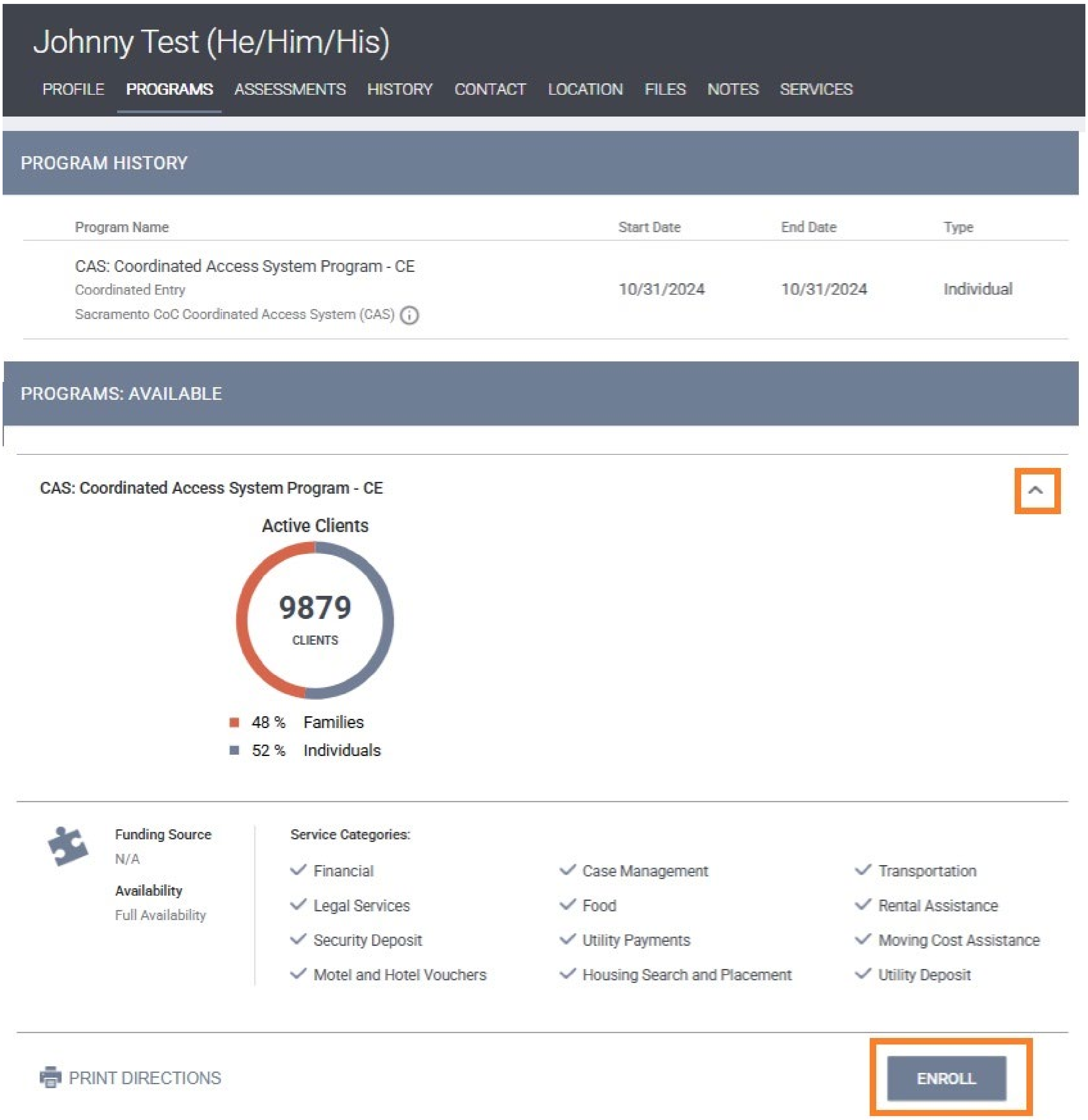
Is the client enrolled in any programs similar to yours? Before you enroll the client in your program, it is important to see who else is serving your client. Talk to your clients about other organizations that are helping them. If they report that they are no longer working with a program that still shows they are actively enrolled, either contact the case manager listed on that enrollment or reach out to HMIS staff to assist you.

Overlapping Enrollments in Temporary and Permanent Housing Programs

This is especially important if your program provides temporary or permanent housing services (like a PSH, ES, TH, or RRH program). Before enrolling the client and logging a service that indicates where the client is sleeping on a given night, you need to make sure that the client is not already receiving services that indicate they are sleeping somewhere else. For example, since the client cannot sleep in more than one place in a given night, you cannot enroll them in a Transitional Housing (TH) program where they will be sleeping tonight if they are already enrolled in an Emergency Shelter program. This causes overlapping enrollment errors that you will need to correct. Even if the enrollments do not involve housing services, identifying if the client is being served by another Supportive Services Only (SSO) or Outreach program can help you coordinate care with colleagues at other community organizations.

Enrolling a Client into a Program

To enroll a client into a program, you first enter the client's global profile and then choose the Program Tab. Scrolling past the client's Program History, you will find the Programs Available section. Here you will see of the programs that this client can be enrolled in within the agency that you are currently working in.

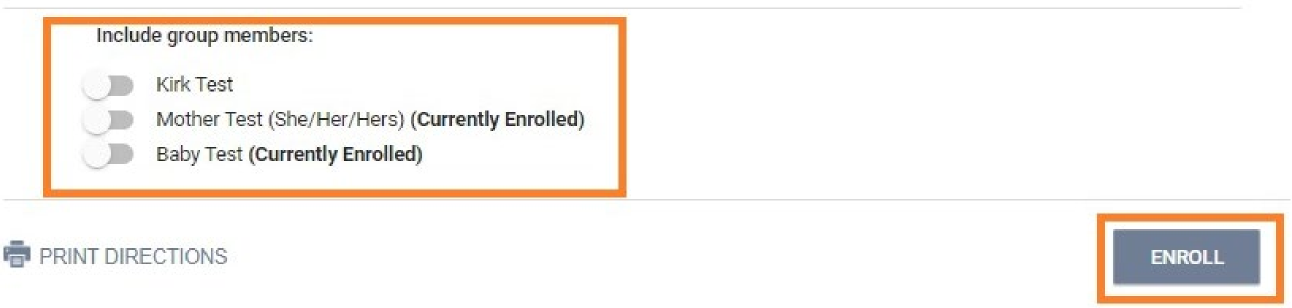


Once you hit "Enroll", you will move to the open the Enrollment Page. Fill out all of the information on the client's enrollment page to the best of your ability and then click Save at the bottom of the page to finish the enrollment.

Enrolling a Household into a Program

If you want to enroll several clients in their household into the same program so they can be served as a group, you will need to complete a group enrollment. In every HMIS household, one client is designated as the **Head of Household** (HoH). This person is the primary member of the household and all other household members are identified via their relationship to the HoH (e.g. child, spouse, etc). When creating a group enrollment, you want to start by enrolling the HoH first.

When you review the programs available for a client who has other people as part of their global household, you will be prompted to include other group members in the enrollment right above the “enroll” button. Choose only the household members that you want to be in this group enrollment and then click the “enroll” button. As you complete the HoH’s enrollment screen, you will be prompted to go to the next client’s enrollment screen until you have enrolled all of the members of the household. We recommend that you have all the information you need to complete enrollments for all household members before starting.

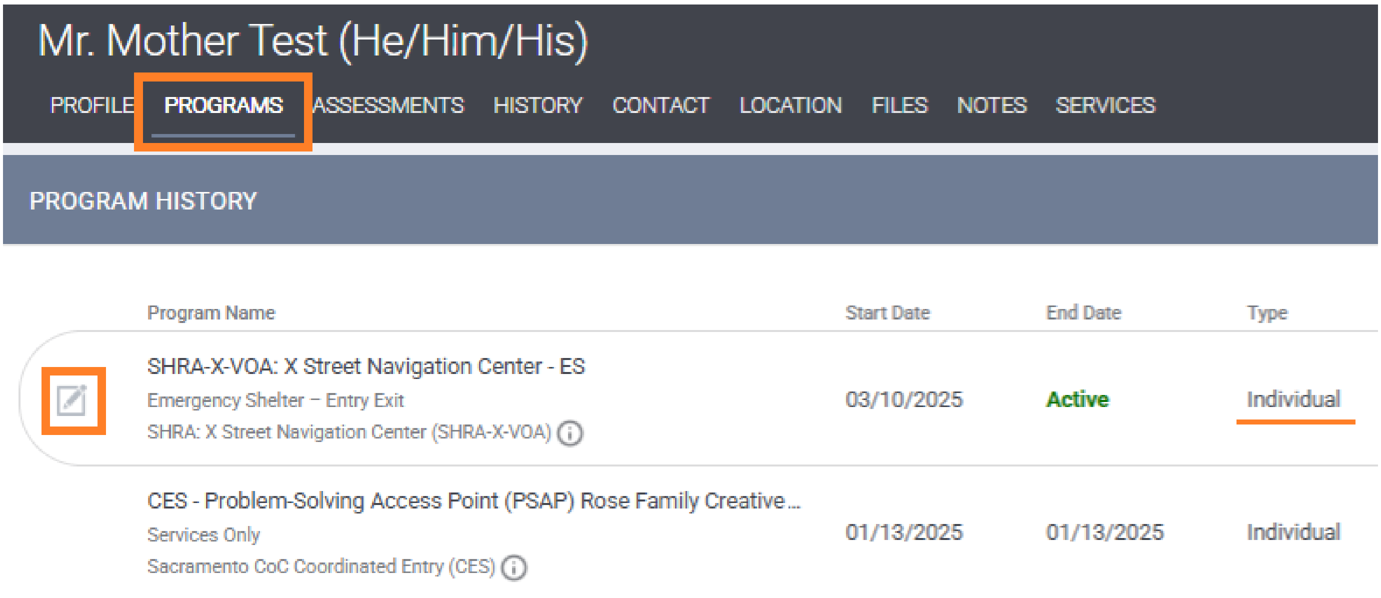


Note: If you have household members who were accidentally enrolled individually, you will need to contact HMIS staff to combine the enrollments.

Enrolling a Household Member Mid-Program

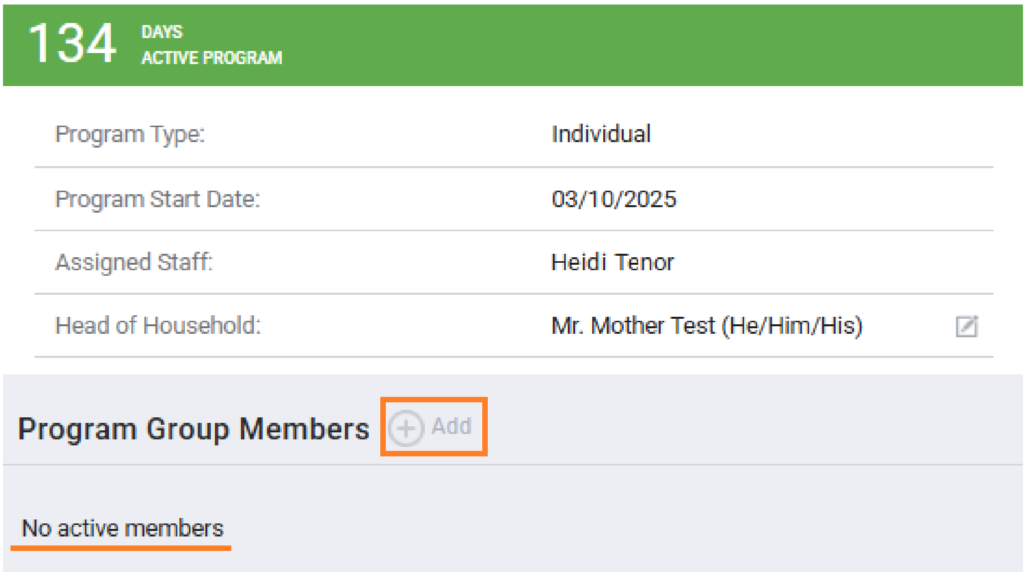
Occasionally, your client will have someone added to their household and you want to add this new individual to the client's group enrollment. If the client has a baby or decides they want to include someone into their group enrollment, please take these steps to correctly enroll the client into the group enrollment. Remember, all clients in a group enrollment are organized through their relationship to the Head of Household (HoH), so we begin by going into this client's group enrollment.

First, open up the Head of Household's client profile. Then move to the Program tab so you can review their program history. If you hover over the title of the program you want to enroll a new household member into, you will see an edit icon appear. Click that icon to open up this program enrollment.

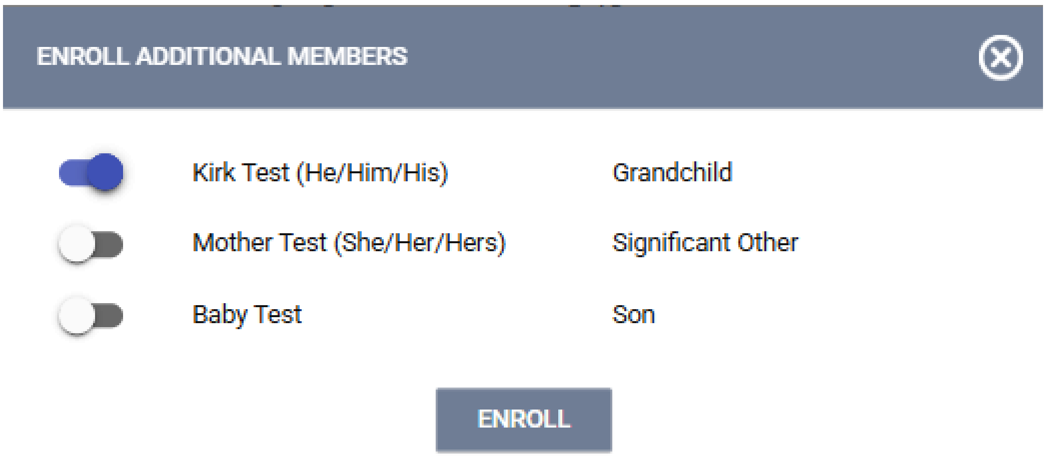


In the enrollment, there is a green box on the right that lists the number of days the client has been active in this program. If the box is red, it means that the client is no longer actively enrolled in the program and will list the number of days since the exit.

In the Program Group Members box farther down, you will hover over the name and then click the "Add" button. This brings up a new screen listing all of the client's household members who are eligible to be enrolled in this program.

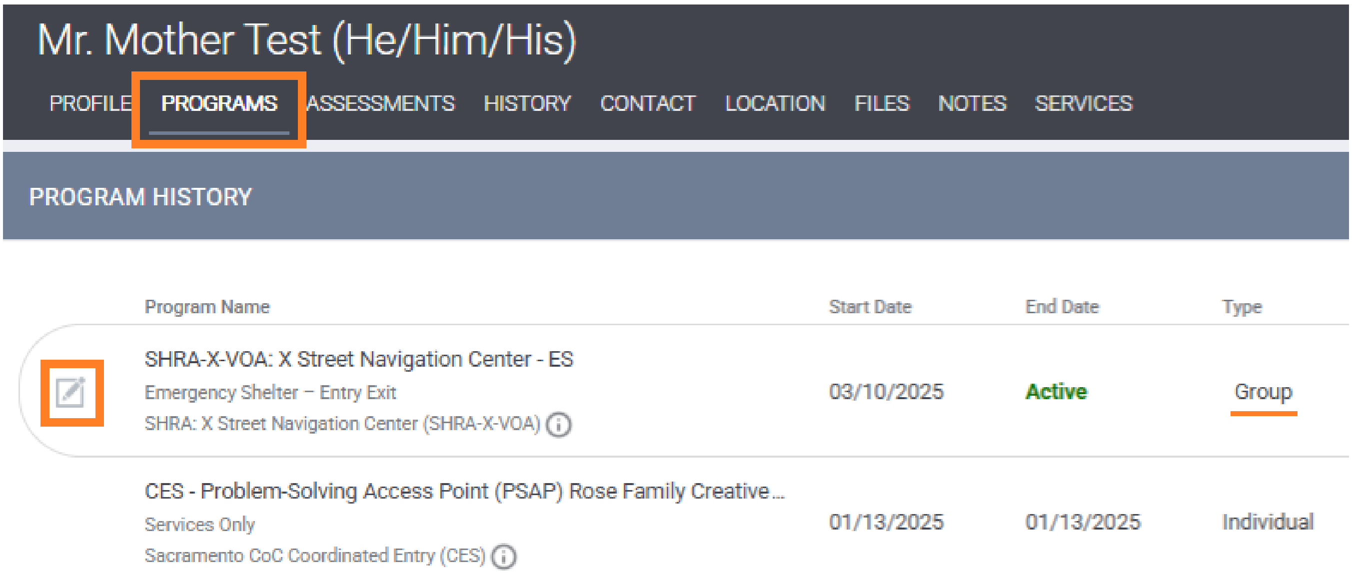


Select any household members you want to add to this client's group enrollment. You do not have to choose all of the household members – just the ones who are going to participate in the program and want to be served together. There are often situations with romantic partnerships or parent/child relationships where the individuals may choose to be enrolled as a group at one point and then later want to be enrolled individually due to changes in the relationship, the nature of the program, or the current custody arrangements of children. In this case, we are adding the client's grandson, Kirk, to this enrollment.

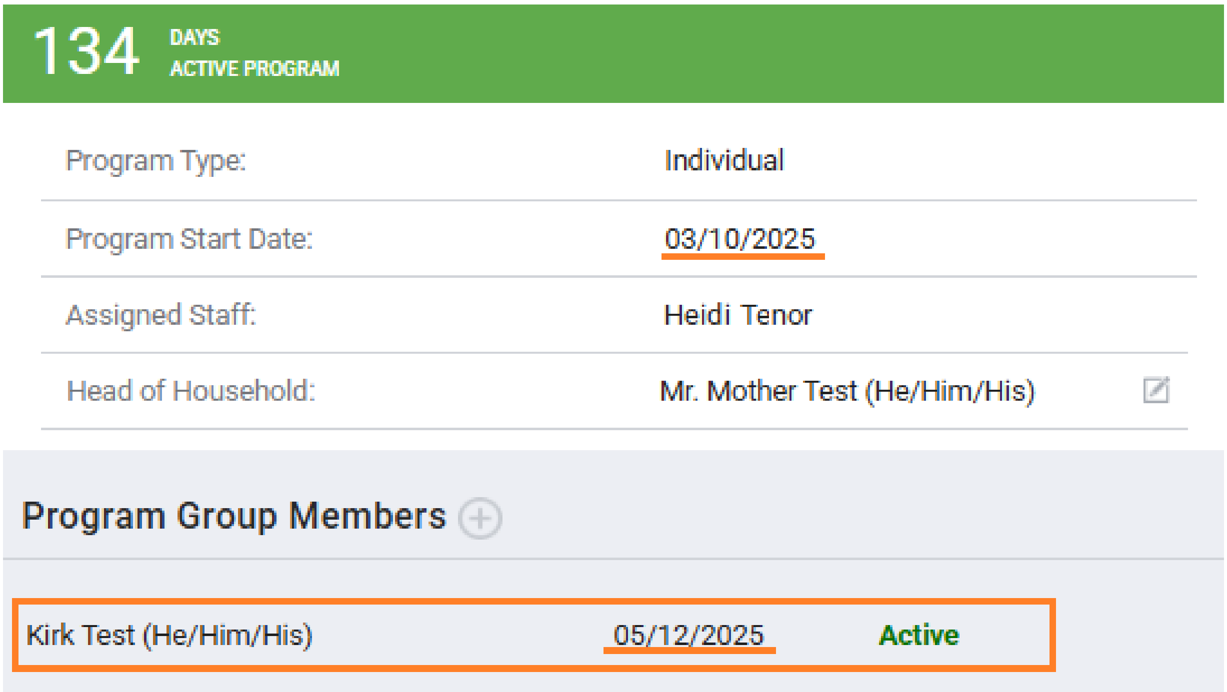


When you click "Enroll", you will go through the same enrollment process as normal. Once you have completed the enrollment, you will see the enrollments are combined into one group enrollment, allowing the clients to be served together.

Here you can see how the client record has changed. When we look at the HoH's program tab, this enrollment now shows as a group enrollment.



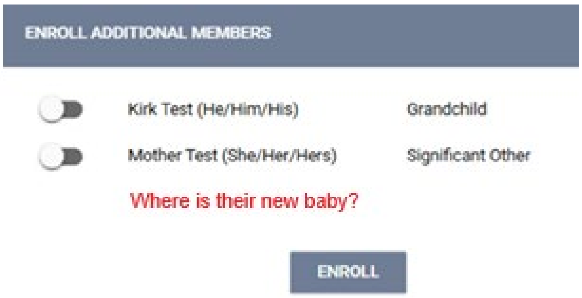
When we go into the enrollment, we see that the HoH has his grandson listed as a group member. The dates also indicate that Mr. Mother Test was enrolled in March and then his grandson Kirk Test was added to this group enrollment two months later.



Troubleshooting Group Enrollment Issues

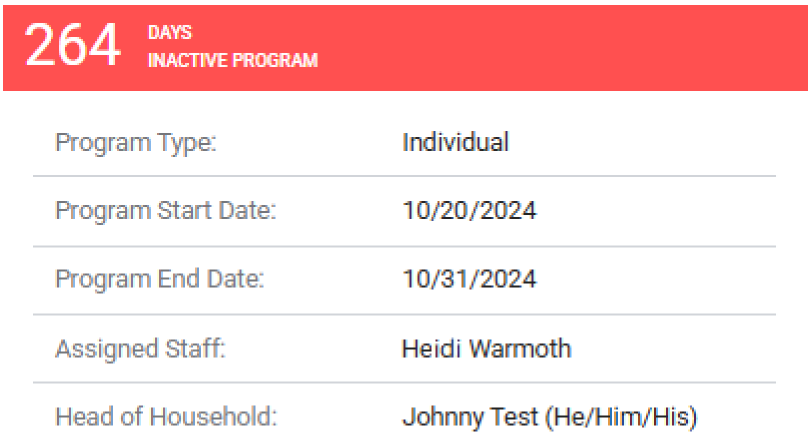
There are two common issues that users run into when trying to create group enrollments. On the left, you see that the HoH's program enrollment does not have a "+ Add" at the top of the Program Group Members box, so there is no way to add members. On the right, you see the Enroll Additional Members box and the household member that they want to add is not listed. For these errors and others, please walk through these troubleshooting steps:

OR



1. *Is the Program Enrollment Closed?*

If you are enrolling a new client into the program, they must be added to an active enrollment. You can tell if the HoH's program enrollment is active by looking at the bar on the right side of the program enrollment screen. Unlike the green bar that shows how many days the client has enrolled, an inactive enrollment shows a red bar and lists the number of days since the client was exited.



If you did not expect the enrollment to be closed, the client may have been automatically exited from the program due to a lack of activity in the enrollment. For more information on automatic exits, please review the Auto-Exit e-blast we sent in July 2023. To reopen the enrollment – either to correct an accidental auto-exit or to clean up inaccurately entered enrollment data into HMIS – you can use our Reopening an Enrollment job aid to help you with this.

2. *The New Client is Already Enrolled in the Program*

In the beginning of this document, we reviewed the Steps to Take Before Enrolling a Client into a Program, including how to Review the Client's Program History. It is possible that another staff member has already enrolled this new client in an individual enrollment. As we mentioned above, there is no way to combine individual enrollments into a group enrollment. If this is your issue, please email HMIS so a staff member can delete the incorrect enrollment. Then you can enroll the client correctly through the group's Head of Household's enrollment.

3. *The New Client isn't in the HoH's Global Household*

Before you can create or add clients to a group enrollment, all of the clients must be established in a shared household. These Global Households help us to identify families, keeping their records connected and helping us to document the needs of the clients. If you have not connected this new client to the household, their name will not show up in that popout window. For more information, please review our Creating a Global Household job aid.

4. *The New Client Has No HMIS Client Profile*

Every client, regardless of age, must have their own client profile. Before you can add a client to a global household and then enroll them in an established group enrollment, the client must first exist in HMIS. For more information, please review our Creating a New Client Profile job aid.