# HMIS Document

# ClientTrack User Guide

## Exiting an Enrollment

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# ClientTrack User Guide – Exiting an Enrollment

## *Exit a Household from an Active Enrollment*

1. On the client's record, go to the active/open enrollment and click on the three dots in front of the enrollment.
2. On the list of action items for the enrollment, select the third option, "Exit the Enrollment".
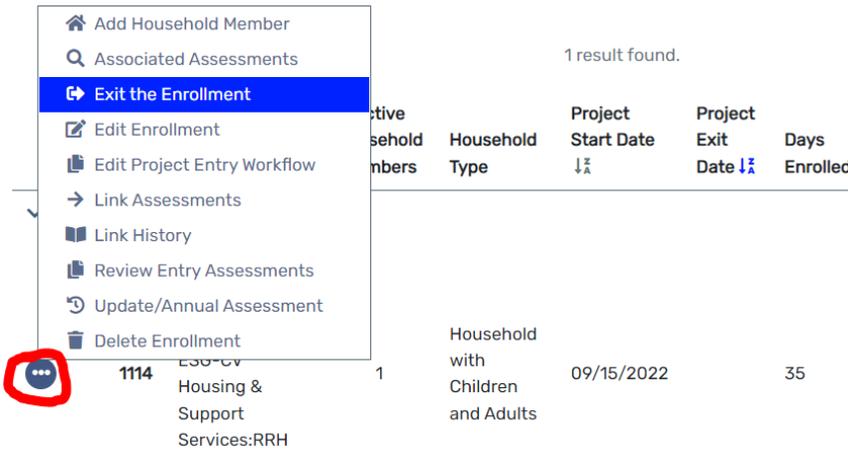


3. Ensure the exit date is correct and select the exit destination and reason for the exit. Optionally, add any additional services that may have occurred prior to the exit. At the bottom of the screen, click "Save".
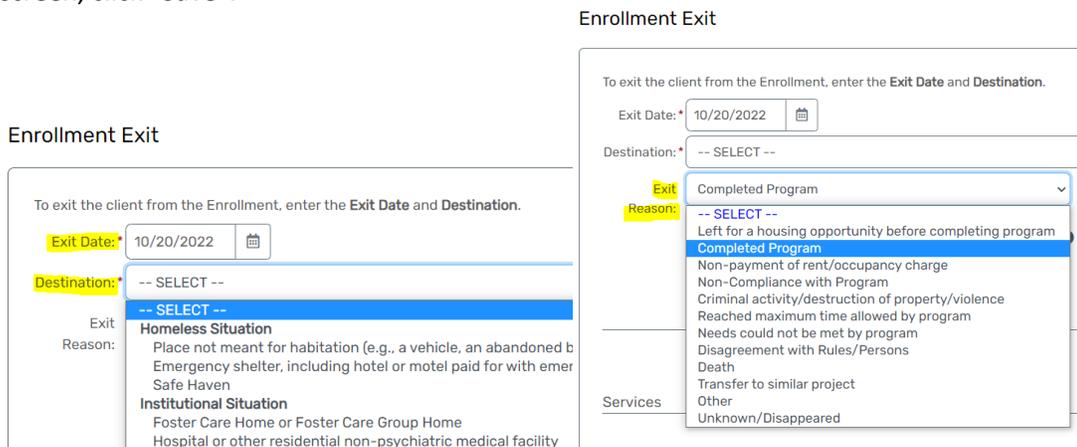


4. Complete the exit assessment. Click "Save" or "Save and close" after updating each screen and include any updates for health insurance, disabilities, income and non-cash benefits along the way.
   a. If there are no updates for any of the sections listed above, either select "Default Last" or simply hit "Save" at the bottom to move on to the next section.
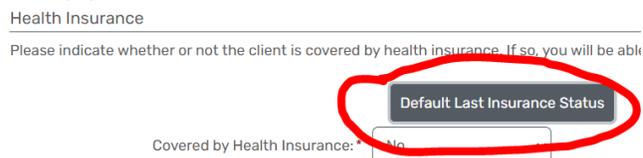
5. If there are other household members in this enrollment, select "Yes" to exit them as well.
   a. ***Note:*** *If someone is exiting due to death or having physically left the household otherwise, exit just that person and leave behind the remaining household members as actively enrolled and receiving services.*

## Do you want to exit?
Do you want to exit West, North?

✔ Yes

✘ No

6. Complete the exit assessment for all additional household members. Once all household members have a completed exit assessment, the system will inform the user that all steps are completed and the workflow may be closed.

## You're done!
All required steps have been completed.
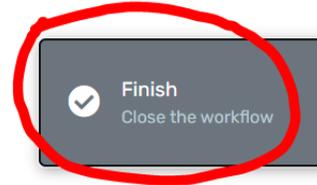
✓ Finish
Close the workflow