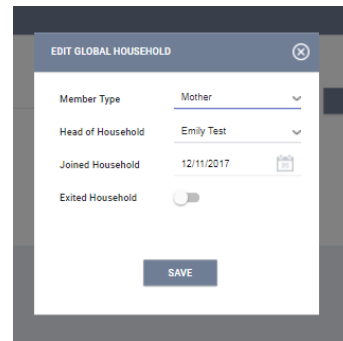


When a Member Leaves the Household

If a member leaves the household, clicking “Edit” from the Household Members list in the Household Management screen. This will allow you to enter an End Date to remove them from the group.

This will remove them from the household and retain a historical record of their time in the group.




Step 4 - Enrolling Clients into Programs

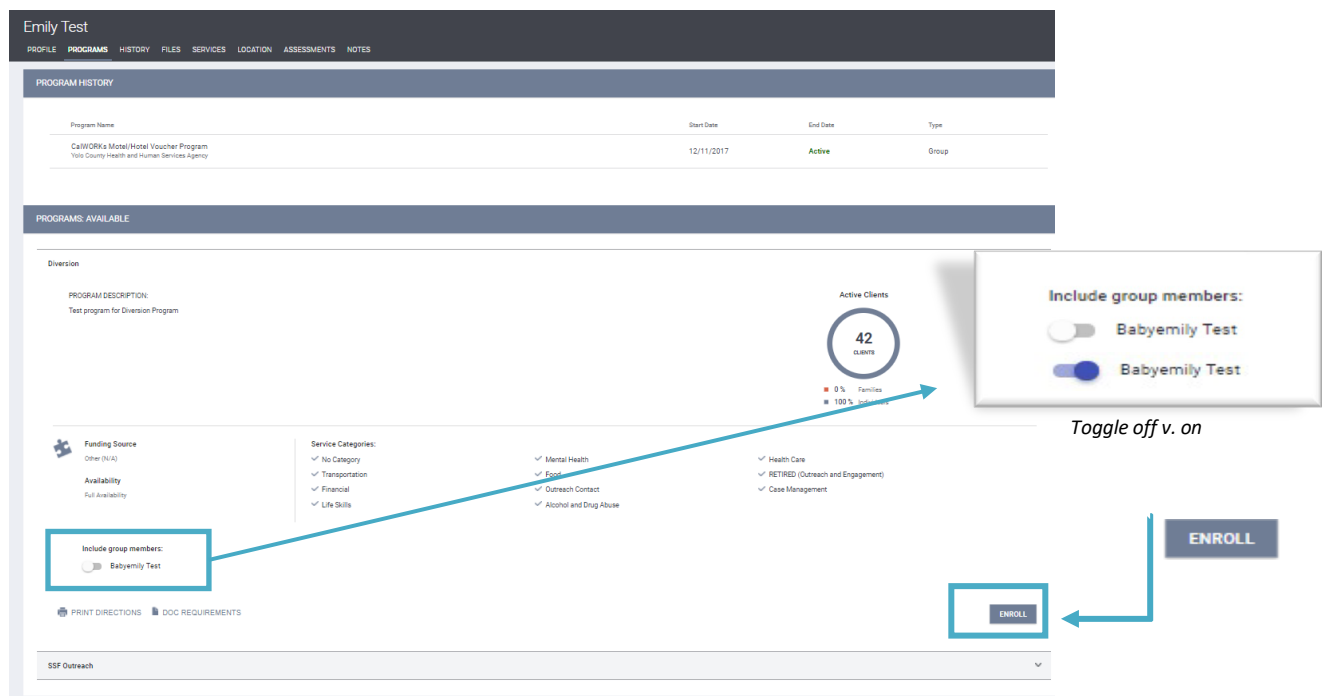
The **Programs tab** in the client file contains the following sections:

Program History: A list of programs your client is either currently enrolled in or has been enrolled in the past.

Programs: Available lists current programs provided by your agency that are available for client enrollment.

Enrolling a Client/Household into a Program

1. Select the down arrow  next to the applicable available program to expand program details.
2. If the client is part of a group, you will be given the **option add group members**. Toggle on those group members you wish to include, if applicable. (Note: If the enrollment is the result of a referral, the toggle will already be on - please keep this toggle position to ensure the referral results are properly tracked.)
3. Select “Enroll”



Emily Test

PROFILE PROGRAMS HISTORY FILES SERVICES LOCATION ASSESSMENTS NOTES

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
CalWORKs (Motel)/Hotel Voucher Program Yuba County Health and Human Services Agency	12/11/2017	Active	Group

PROGRAMS AVAILABLE

Diversion

PROGRAM DESCRIPTION:
Test program for Diversion Program

Active Clients: 42 clients

0% Families, 100% Individuals

Include group members:
 Babyemily Test

Toggle off v. on

ENROLL

ENROLL

PRINT DIRECTIONS DOC REQUIREMENTS

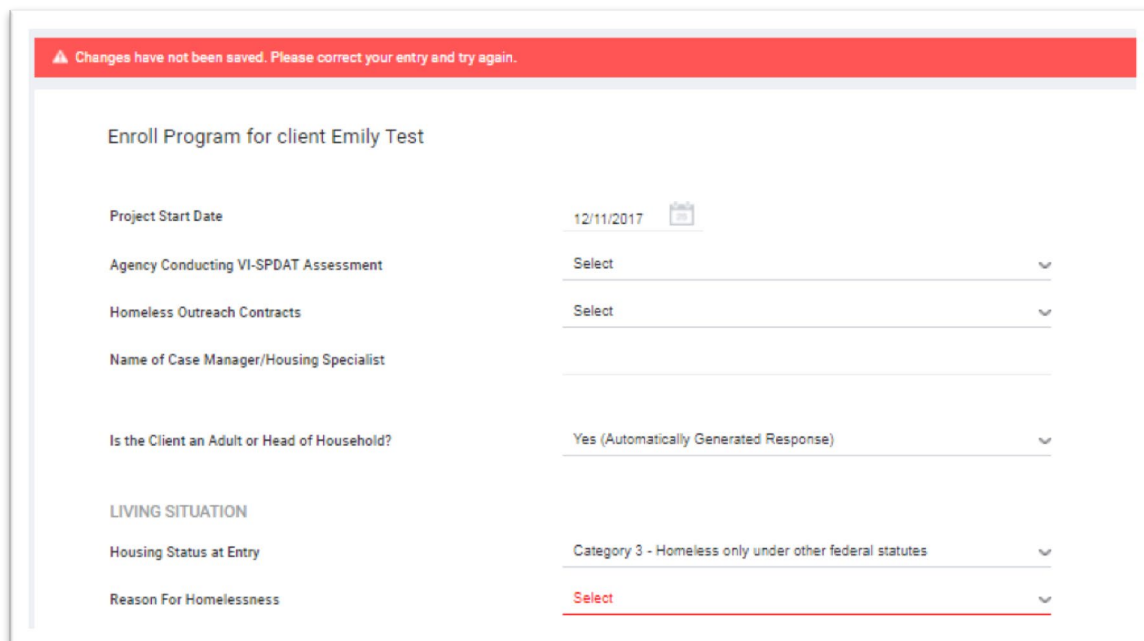
SSF Outreach

4. Complete ALL fields in the enrollment page for your client and click “Save & Next”. If any other group members were included in this program, their Enrollment page will automatically come up next until each member has been completed. Continue to click “Save & Next” after completing each group member’s Enrollment. Enrolled group members will be listed in the right side bar under “Program Group Members”.

NOTE: Program Data Quality

It is critical that ALL fields on the Enrollment are completed in full. Every question asked in this area corresponds directly to the required APR for your program(s).

In the example below, required program fields were left blank illustrating required data elements in order to save the client enrollment. **If a required field is left unanswered, the enrollment will not save and message shown below will appear.**



Changes have not been saved. Please correct your entry and try again.

Enroll Program for client Emily Test

Project Start Date 12/11/2017

Agency Conducting VI-SPDAT Assessment Select

Homeless Outreach Contracts Select

Name of Case Manager/Housing Specialist

Is the Client an Adult or Head of Household? Yes (Automatically Generated Response)

LIVING SITUATION

Housing Status at Entry Category 3 - Homeless only under other federal statutes

Reason For Homelessness Select

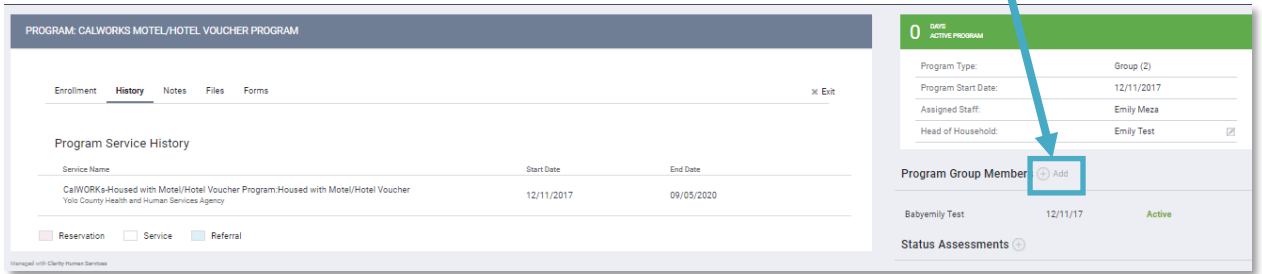
Enrolling a Group Member Mid-program

What if a family member joins the family/individual later during the program stay?

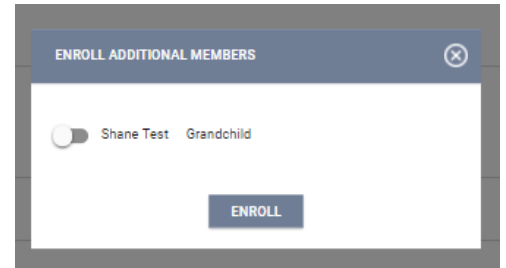
- All additional members must be enrolled through the “Head of the Household”
- To Enroll the additional member to the group:
 1. Select the Head of Household profile
 2. Select the ‘Programs’ tab
 3. Hover over the appropriate program name under ‘Programs History’ and select the Edit

icon 

4. Select 'Add' next to 'Program Group Members'



5. You will be prompted to toggle on any additional group/household members on profile. Select any members and then 'Enroll'.





6. **Complete ALL fields in the enrollment page(s)** for your new enrollees and click **'Save & Next'**. As before, if there is more than one group member selected, their Enrollment page will automatically come up next until each member has been completed.

Making a Program Private

In the event a client doesn't want to share their information with other agencies, it's the responsibility of the user to make their program (enrollment information) private.

To make the program private:

1. Select the 'Program' tab
2. Hover over the appropriate program name and select the Edit icon 
3. From the program screen, locate the program details box in the upper-right hand corner. Next to 'Assigned Staff', select the Edit icon 
4. Toggle on the "Make Program Private" box and then "Save Changes". You must follow the same steps for all household members

