

# Creating and Managing Program Enrollments

In Clarity Human Services, a *Program* (or *Project* in the [HMIS Data Standards](#)) represents a unit of an *Agency* (or *Organization*) in which a client or household enrolls. Program enrollments provide the framework for HMIS data collection and reporting.

The Programs available to a user will depend on agency and staff member settings. Refer to [How to Set Up a Program: Detailed Instructions](#) and [Additional Agency Access](#) for more information.

To enroll a client or household in a Program, click the *PROGRAMS* tab in the client record. The tab contains two sections: PROGRAMS: AVAILABLE and PROGRAM HISTORY.

## Programs: Available

The PROGRAMS: AVAILABLE section lists programs provided by your agency that are available for client enrollment.



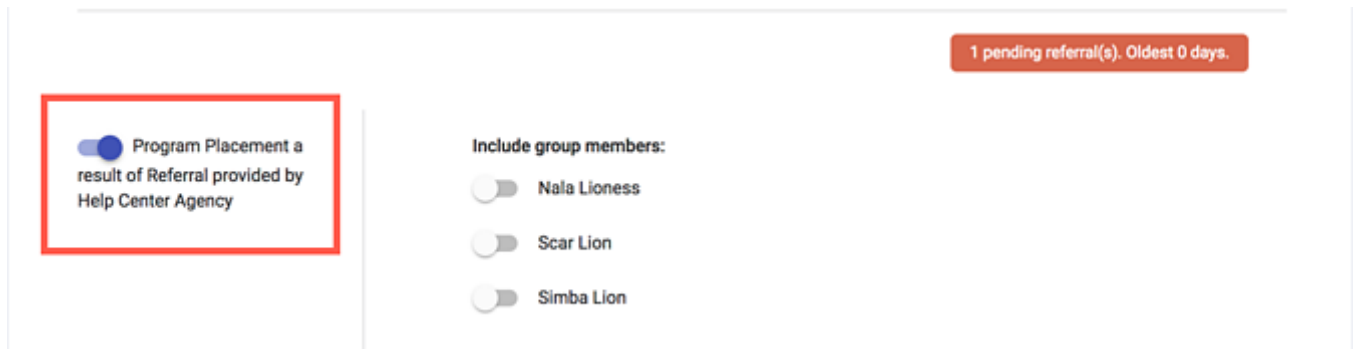
To enroll a client/household into a Program, click the down arrow next to the applicable Program title. Additional information and options will display.

## Include Group Members

If you have created a [family/household](#) for the client, you will be prompted to select family/household members to include in the enrollment. Click the toggle(s) next to the family member(s) who should be enrolled in the Program.

## Referral Checkbox

If there is an "open" referral to the Program, a *Program Placement a result of Referral provided by (referring agency)* toggle will display. Toggle this on to create a [Referral Connection](#) within the associated referral.



## Enroll

Click *ENROLL* to display the *Program Enrollment* screen for your *original* client.

All program enrollments have an associated *Program Enrollment* screen. The *Program Enrollment* screen is the equivalent of an intake or entry form; it contains data fields to record client information.

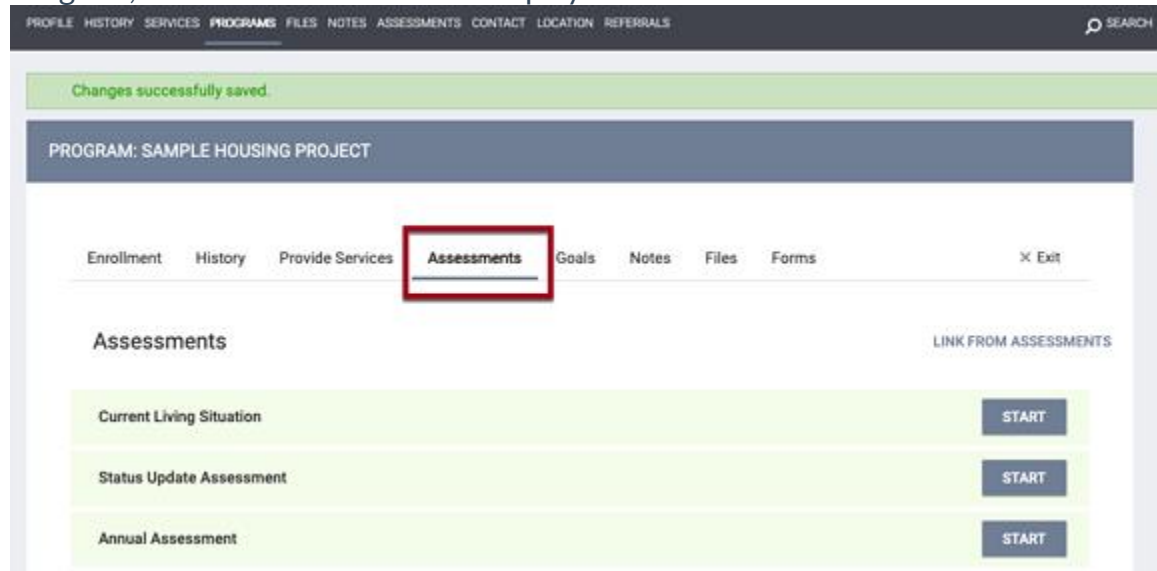
Enrollment screens for Permanent Housing (PH) projects will include a *Housing Move-In Date* field that should be completed when the client moves into a PH unit. The *Housing Move-In Date* must be on or between the *Program Start Date* and *Program Exit Date*.

Click *SAVE & CLOSE* to complete the enrollment.

**NOTE:** *If you are enrolling other household/family members, you will see a *SAVE & NEXT* button. Clicking this button will enroll the current member and automatically take you to the correct *Program Enrollment* screen for the next member.*

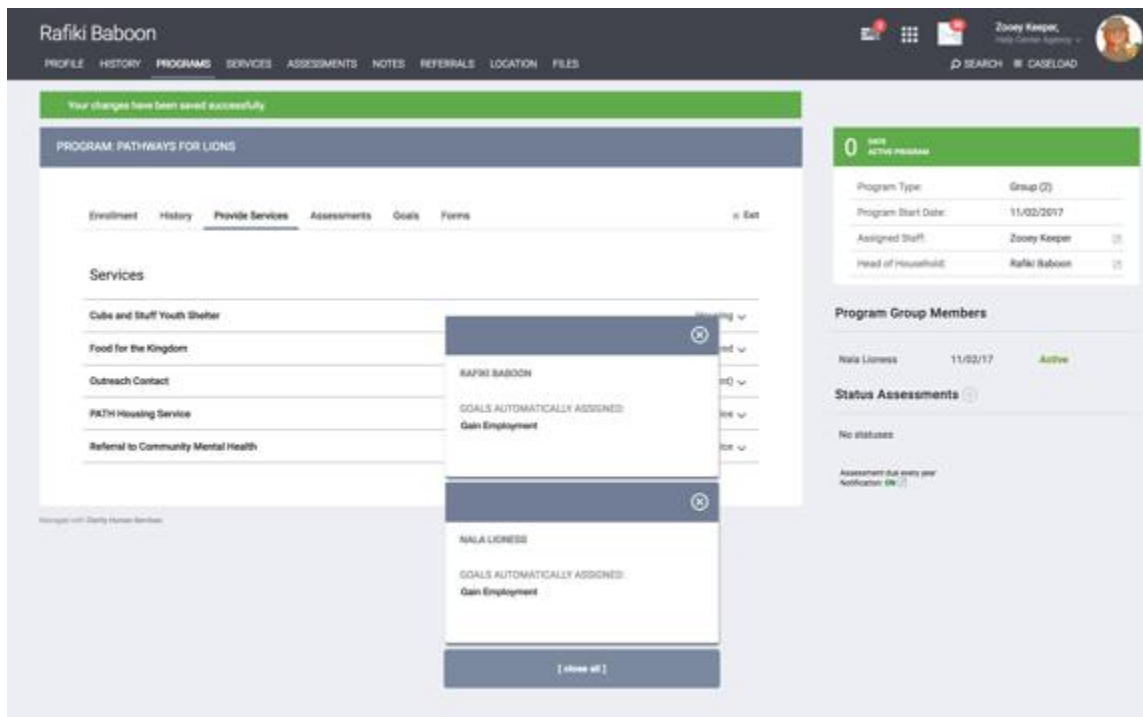
The screen that appears next depends on the following:

- If the [Current Living Situation](#) assessment is required upon enrollment for that Program, the **Assessments** tab will display.



- If [Manage Units](#) is enabled for the Program, the **Units** tab will display (except when the [Current Living Situation](#) assessment is required).
- Otherwise, the *Provide Services* screen will display.

If the Program has been configured with [Default Goals](#) or [Auto Service Placement](#), a pop-up will appear on the *Provide Services* screen that lists all the actions the system conducted automatically upon enrollment.



## Additional Enrollment Information

Once you save the enrollment, additional information will display in the sidebar.

### Information Box

The information box contains the following Program enrollment information:


- Number of days the client has been enrolled in the Program
- *Program Type* (group or individual)
- *Program Start Date*
- *Program End Date* (if applicable)
- [Assigned Staff](#) (the staff member who enrolled the client into the Program)
- *Head of Household*

If a client is no longer active in the Program, a red DAYS INACTIVE PROGRAM banner appears across the top of the box to indicate the number of days the client was active in the Program.

356 DAYS ACTIVE PROGRAM		356 DAYS INACTIVE PROGRAM	
Program Type:	Group (2)	Program Type:	Group (2)
Program Start Date:	11/17/2016	Program Start Date:	11/17/2016
Program End Date:		Program End Date:	11/08/2017
Assigned Staff:	Zoey Keeper <input checked="" type="checkbox"/>	Assigned Staff:	Zoey Keeper <input checked="" type="checkbox"/>
Head of Household:	Marlin Clownfish <input checked="" type="checkbox"/>	Head of Household:	Marlin Clownfish

### Program Group Members

This section allows you to directly access the client record for any group member included in the enrollment. Selecting the *Edit* link will take you to the *History tab* of that group member's enrollment.


Program Group Members			
Cascade Carl	08/03/20	Active	
Status Assessments <input data-bbox="511 1795 552 1837" type="button" value="+"/>			

## Program History

Clicking the PROGRAMS tab displays the PROGRAM HISTORY section, which lists the client's current and past Program enrollments.

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
Bridges to Housing PH - Rapid Re-Housing Additional Agency Access Agency ⓘ	05/26/2020	Active	Individual

The PROGRAM HISTORY section displays the following details that also appear with an enrollment in the [History tab](#):

- **Program/Agency:** the program and agency name of the enrollment program.
- **Start/End Dates:** the *Program Entry Date* and (if applicable) *Program Exit Date* for each enrollment. If the client is still enrolled in the Program, the *End Date* will display as "Active."
- **Referral Placement:** A chain-link icon  indicates that the program enrollment resulted from a referral. Hover over the icon to display the name of the agency that created the referral and the date the referral was made.
- **Program Type:** The enrollment program's *Type*.
- **Primary Agency:** An ⓘ icon indicates that the enrollment was created by a staff member when switched into a different agency. Click the icon to display the staff member's primary agency.

In addition, the PROGRAM HISTORY section displays:

- **Type:** whether the client was enrolled in the Program as a group with household members or as an individual.

## Editing an Enrollment

To edit a program enrollment, hover over the program row and click the *Edit* icon.



If the Program is outside of your agency, your ability to edit it depends on your [sharing settings](#). If you have any questions about your sharing settings, please consult with your system administrator for details.

Clicking the *Edit* icon will take you to the [History tab](#) of the enrollment, which contains *Program Service History*. Your access to other tabs ([Enrollment](#), [Provide Services](#), [Assessments](#), [Goals](#), [Notes](#), [Files](#), [Forms](#), [Units](#), and [Exit](#)) depends on the [Program's configuration](#) and your [access role settings](#).

PROGRAM: ZAZU'S FOOD PANTRY

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Enrollment History Provide Services Assessments Goals Notes Files Chart Forms × Exit

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**Program Service History** LINK FROM HISTORY

Service Name	Start Date	End Date
Employment:Employment for Lions Help Center Agency	11/08/2017	01/31/2018
Food for the Kingdom :Evening Meal Help Center Agency	10/18/2017	10/18/2017

Reservation    Service    Referral