

How to Enroll Clients into Programs

To enroll a client or household in a program, click the Programs tab in the client record. The tab contains two sections:

- **Programs History:** A list of programs your client is either currently enrolled in or has been enrolled in the past.
- **Programs Available:** Available lists current programs provided by your agency that are available for client enrollment.

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
Alliance County Emergency Shelter Emergency Shelter - Entry Exit Alliance Against Family Violence ⓘ	07/18/2024	Active	Individual
CES Services Only Community Action Partnership of Kern ⓘ	06/14/2024	Active	Individual
Alliance City Emergency Shelter Emergency Shelter - Entry Exit Alliance Against Family Violence ⓘ	05/16/2024	06/13/2024	Individual

PROGRAMS: AVAILABLE	
Alliance City Emergency Shelter	▼

1. Click the down arrow  next to the applicable program title. Additional options will display.
2. **Include Group Members:** If the client is a part of a Household/Family, you will be prompted to include Household Members. Click the toggle(s) next to the family member(s) who should be enrolled in the program.
3. **Enroll:** after clicking enroll, you will be taken to the *Program Enrollment* screen for your client. If there are other household members, there will be a “Save & Next” button. Selecting this will enroll the current member and automatically take you to the Program Enrollment screen for the next member. ALL fields in the enrollment page must be completed for you to progress to the next screen.

After completion of enrollment, you will be taken to the Summary of Actions page.



Changes successfully saved.

PROGRAM: ALLIANCE COUNTY EMERGENCY SHELTER

Enrollment History Provide Services Assessments Notes Files X Exit

Assessments LINK FROM ASSESSMENTS

Current Living Situation **START**

Status Update Assessment **START**

Annual Assessment **START**

ASSESSMENT HISTORY

0 **Link** **Active member**

Program Type: Individual

Program Start Date: 08/23/2024

Assigned Staff: Jarney Candiana ⓘ

Head of Household: Rogers Steve ⓘ

Program Group Members ⓘ

No active members

Status Assessments ⓘ

No statuses

Assessment due every year
Notification: OFF ⓘ

Enrolling a Group Member Mid-Program

What if a new member joins the Household later during the program stay?

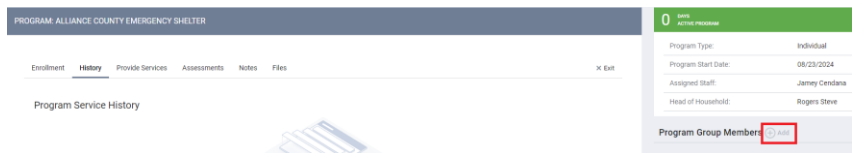
To add a new member to an active enrollment, first ensure that the client is added to the household.

Next, navigate to the record for the Head of Household in the enrollment.

Click to the edit icon  next to the active enrollment in the Programs tab.

	Alliance City Emergency Shelter Emergency Shelter - Entry Exit Alliance Against Family Violence ⓘ	07/18/2024	Active	Individual
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Click the add icon next to the Program Group Member located in the right sidebar.



PROGRAM: ALLIANCE COUNTY EMERGENCY SHELTER

Enrollment History Provide Services Assessments Notes Files X Exit

Program Service History

0 **Link** **Active member**

Program Type: Individual

Program Start Date: 08/23/2024

Assigned Staff: Jarney Candiana ⓘ

Head of Household: Rogers Steve ⓘ

Program Group Members **ADD**

An “Enroll Additional Members popup box will provide the option to add any Group Member who is not already included in the enrollment. Click the toggle next to the client(s) you wish to add. Click Enroll.

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Making the Client Record Private

Sometimes an individual client or household will request their data not be shared in Clarity Human Services outside the agency they are being served by. When this occurs, the client record or components of it can be made private.

****Note:**

- System administrators are able to see all client data even if marked private.
- Only staff members assigned to or switched into the agency where the data was recorded can edit the privacy of data.

1. Navigate to the Client Privacy shield icon  in the upper-right hand corner of the client record.
2. Select Private and save changes

PRIVACY

Client Privacy

Public

Private

Consent Refused



3. Repeat steps for Household Member.

Making Program Enrollments Private

To make a program enrollment private:

1. Navigate to the enrollment in the client record and click the edit icon  next to the Assigned Staff.

0 DAYS
ACTIVE PROGRAM

Program Type:	Individual
Program Start Date:	08/23/2024
Assigned Staff:	Jamey Cendana 
Head of Household:	Optimus Prime 

2. Toggle on **Make Program Private**.

CHANGE ASSIGNED STAFF

Make Program Private



Jamey Cendana



SAVE CHANGES

CANCEL