

Pausing and Managing Paused Workflows

Pausing a workflow can be helpful but use this with caution. If paused workflows aren't completed, partial enrollments may cause data errors, and/or two enrollments for the same program may be created.

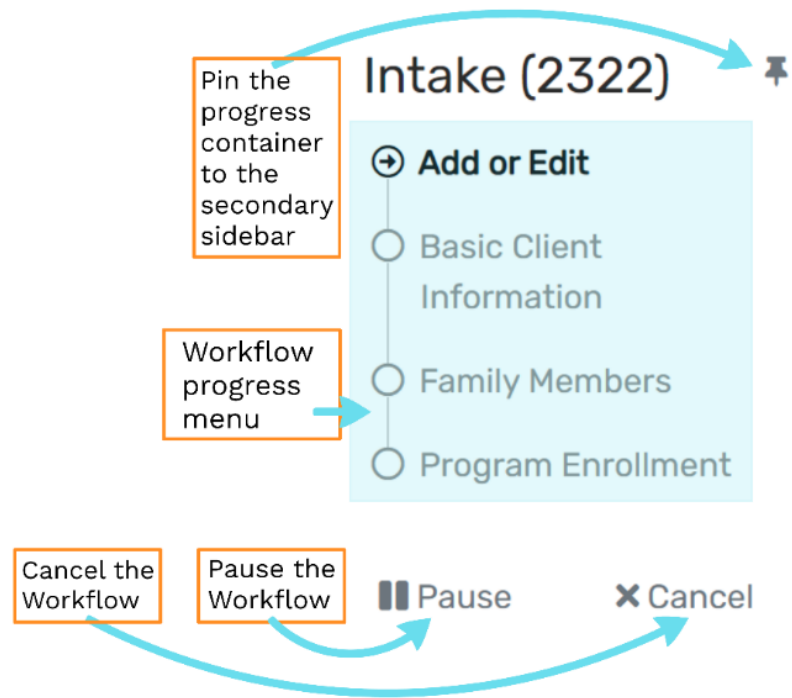
Pausing a workflow will save all the data you have entered up until the Workflow is paused.

Steps to Pause a Workflow

Open workflows* can be paused using the following steps:

**For information and instructions on navigating through a workflow, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows/Navigating through a Workflow in the "HMIS Basic User 2025 Manual".*

Step 1: Press the pause button to pause the workflow.



Workflow Navigation Pane Anatomy

Step 2: ClientTrack will confirm you have paused the workflow by presenting a pop-up window. Click OK.

Steps to Resume or Restart a Paused Workflow.

Pause workflows can be viewed and resumed in the “Paused Operations” subfolder.

Step 1: Navigate to the Home Workspace*.

**To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “My ClientTrack” secondary sidebar* menu option. A dropdown menu will appear under the “My ClientTrack” folder.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

Step 3: Under the “My ClientTrack” folder dropdown menu, select the “Paused Operations” subfolder.

Step 4: Select the resume icon* next to the appropriate paused workflow. To restart the enrollment from the beginning of the workflow, select the restart icon. ClientTrack will navigate to the “Client Workspace” and navigate to the workflow navigation pane and workflow workspace container.

**To view a list of icons and buttons used in Client Track HMIS, see Chapter:1: HMIS ClientTrack Basics/Key Terminology and Navigation/Icons and Buttons in the “HMIS Basic User 2025 Manual”.*

The screenshot shows the ClientTrack interface. On the left is a dark blue sidebar with navigation icons and labels. At the top of the sidebar, a light blue arrow points to the profile icon. Below it, another light blue arrow points to the 'Paused Operations' menu item. The main content area has a header with 'training trainer' and 'Community Practice Collaborative - ESHC HMIS Programs'. Below the header, there are two sections: 'Paused Forms' and 'Paused Workflows'. The 'Paused Workflows' section contains a table with one row of data. Below the table, three callout boxes with orange borders and arrows point to the play, refresh, and close icons respectively.

Paused Operations

Paused Forms

The list below displays the forms you've paused. You can either resume the process where you left off, or purge the paused operation from the system.

Identification	Form Description	Step	Paused

Paused Workflows

The list below displays the workflows you've paused. You can resume the process where you left off; restart the workflow, merging in changes made in the designer; or purge the paused workflow from the system.

 Show completed workflows

Description	Workflow	Step	Paused
2024 HMIS Program Data	James, Lebron Bradley	Add or Edit	Sep 9, 2024 2:01 PM

▶ ↺ ✕

Resume the Workflow Restart the Workflow Cancel the Workflow

Paused Operations Basic Page Anatomy

Step 5: Complete the workflow*.

**For instructions on how to navigate through ClientTrack Workflows, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows/Navigating through a Workflow in the “HMIS Basic User 2025 Manual”.*

Steps to Cancel a Paused Workflow

Tips and Tricks - HMIS Intake Workflows - Cancelling workflow after "Program Enrollment" step



- Once an intake enrollment workflow is completed through the "Program Enrollment" step, cancelling a workflow will not cancel the program enrollment.

Tips and Tricks – Cancelling Workflow After "Program Enrollment" Step

Paused operations prior to completing the "Program Enrollment" step* in the intake workflow** can be cancelled.

**To cancel a workflow after the "Program Enrollment" step is completed, please reach out to hmis@changinghomelessness.org to have the workflow and enrollment cancelled.*

***For information on ClientTrack Workflows, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows in the "HMIS Basic User 2025 Manual".*

Step 1: Navigate to the Home Workspace*.

**To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

Step 2: Select the "My ClientTrack" secondary sidebar* menu option. A dropdown menu will appear under the "My ClientTrack" folder.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the "HMIS Basic User 2025 Manual".*

Step 3: Under the "My ClientTrack" folder dropdown menu, select the "Paused Operations" subfolder.

Step 4: Select the cancel icon* next to the appropriate paused workflow.

**To view a list of icons and buttons used in Client Track HMIS, see Chapter:1: HMIS ClientTrack Basics/Key Terminology and Navigation/Icons and Buttons in the “HMIS Basic User 2025 Manual”.*

Editing Completed Enrollment Workflows (Entry/Exit)

To edit an enrollment workflow, you can do so by using the “Edit ‘_____’ Workflow” action built into ClientTrack.

Steps to Edit an Entry/Exit Workflow

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”***.

** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Enrollments” secondary sidebar* menu option. ClientTrack will navigate to the “Enrollments” workspace container.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

Step 3: Click the action button* next to the appropriate enrollment.

For an existing enrollment, select, “Edit Entry Workflow”**.

For an exited enrollment, select, “Edit Exit Workflow”**.

** To view a list of icons and buttons used in Client Track HMIS, see Chapter:1: HMIS ClientTrack Basics/Key Terminology and Navigation/Icons and Buttons in the “HMIS Basic User 2025 Manual”.*

*** ClientTrack will navigate to the previously completed Entry/Exit Workflow, including any assessments required at the program entry/exit.*

Lebron James 4/4/1994
624 904-555-8458

Enrollments

25 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
SCU - Single men Shelter Program	1	12/06/2018				Sulzbacher Center	12/06/2018
Previous							
CRM - Emergency Services	7	07/31/2024		07/31/2024	No exit interview completed	City Rescue Mission	
MHRC - Coordinated Entry	1	07/28/2020		06/14/2023	No exit interview completed	Mental Health Resource Center	07/28/2020
SCU - CHAMPS	1	08/12/2021		01/20/2022	Deceased	Sulzbacher Center	01/20/2022
COJ- CV ESG HP 2020-2021	1	11/15/2021		05/12/2022	Staying or living with friends, permanent tenure	Catholic Charities Bureau	05/12/2022
FL - 510 Homeless Prevention	1	04/11/2024		10/30/2024	Staying or living with family, permanent tenure	Catholic Charities Bureau	10/30/2024
FPJ - Family Support	1	10/12/2023		12/12/2023	Staying or living with family, permanent tenure	Family Promise of Jacksonville	12/12/2023
		12/14/2021	01/07/2022	05/25/2022	Staying or living with family, permanent tenure	Community Practice Collaborative	05/25/2022
		05/18/2023		06/05/2024	Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)	Changing Homelessness	06/05/2024
		07/20/2022		07/21/2022	Rental by client, no ongoing housing subsidy	Community Practice Collaborative	07/21/2022
		10/12/2023		12/12/2023	Transitional Housing for homeless persons (including homeless youth)	Family Promise of Jacksonville	12/12/2023
COJ- CV ESG RRH 2020-2021	1	11/17/2021		03/31/2022	Transitional Housing for homeless persons (including homeless youth)	Mission House Inc	03/31/2022
	1	08/25/2020		08/31/2020		Changing Homelessness	

Cancel

Edit Workflows – Editing Exit Workflow

Step 4: Navigate through the workflow* and make changes as applicable**

** For information and instructions on navigating through a workflow, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows/Navigating through a Workflow in the “HMIS Basic User 2025 Manual”.*

*** Going through the “Edit Workflow” will replace the data captured in the previous workflow.*