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.

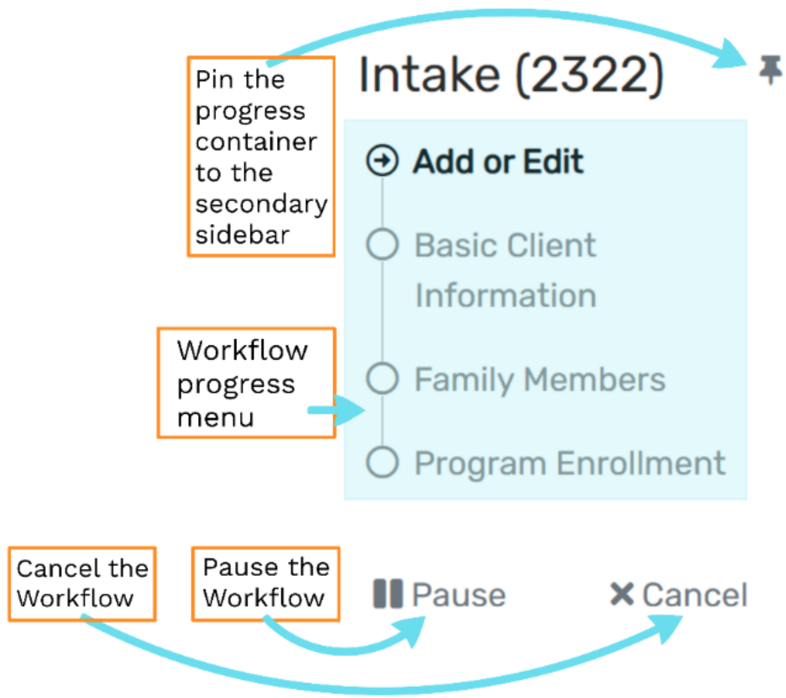
Pausing a workflow will save all the data you have entered up until the Workflow is paused.

<u>Steps to Pause a Workflow</u>

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".

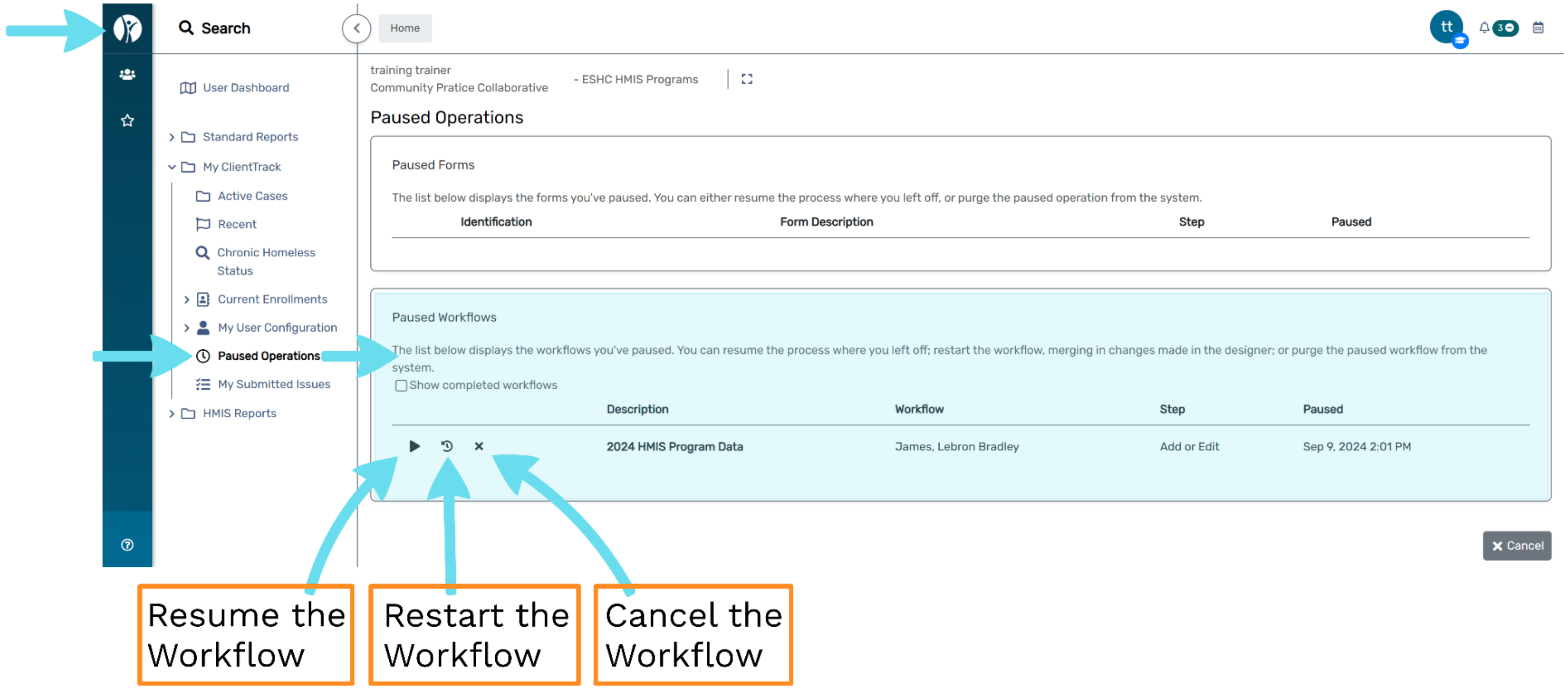
Step 2: Select the "My ClientTrack" secondary sidebar* menu option. A dropdown menu will appear under the "My ClientTrack" folder.

**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".



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”.

<u>Steps to Cancel a Paused Workflow</u>

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.

<u>Steps to Edit an Entry/Exit Workflow</u>

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".

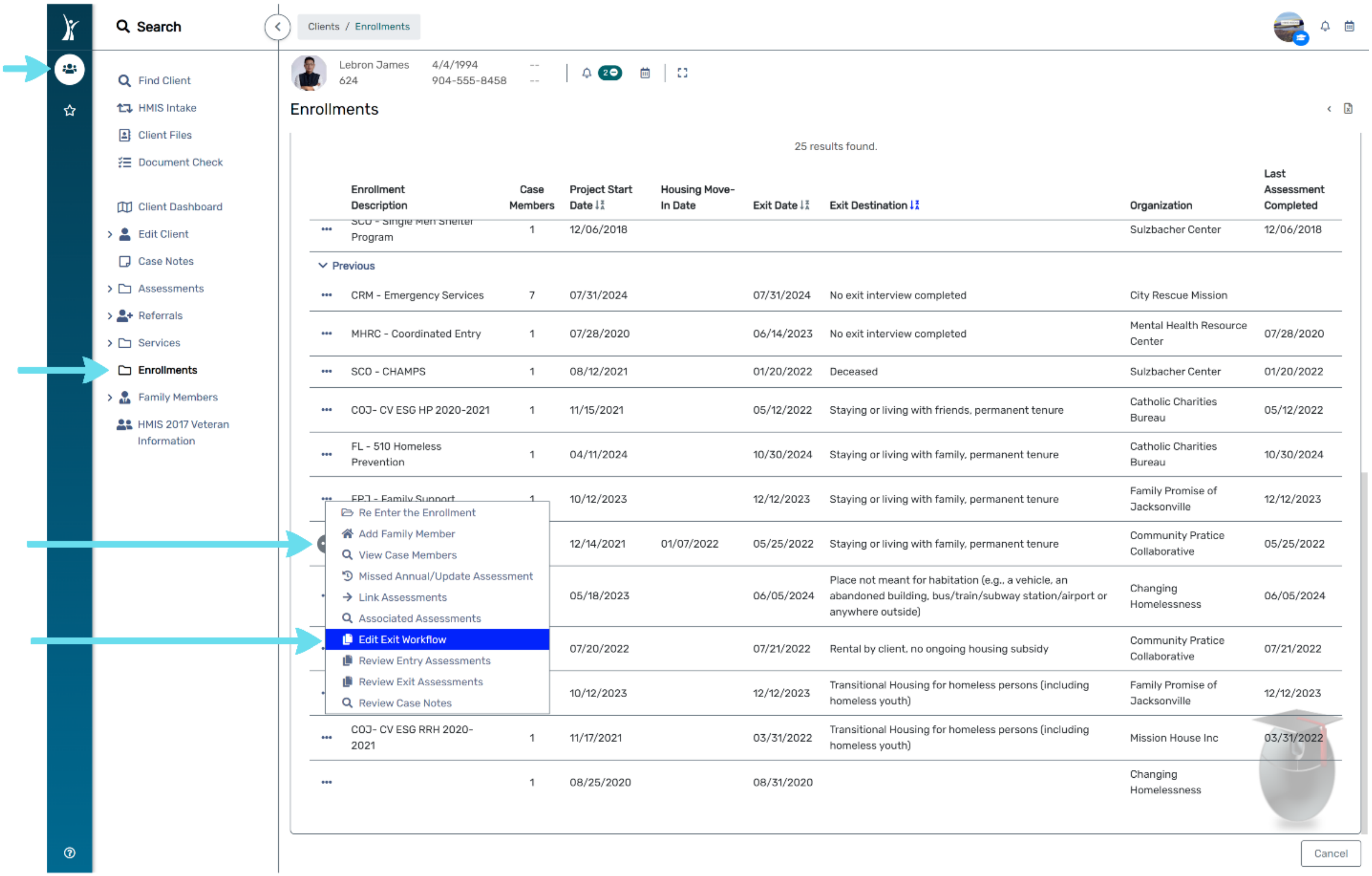
Step 3: Click the action button* next to the appropriate enrollment.

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.*



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*.