Edit Client: Folder

The "Edit Client" folder menu option on the "Client Workspace" provides in-depth non-program related historical information that pertains to the client such as past addresses, any emergency contacts, past case managers, etc.

Tips and Tricks - *Editing Client Information*

- HMIS is designed to cut down on the amount of time data collection takes. The main way it accomplishes this is that data is shared across agencies. One of the main objectives of this feature is to prevent a client from having to provide their history and personal information to every agency that they visit for services or other assistance. The ability to share data also means that in some instances, it is possible to delete or alter data that should not be deleted or altered. In the sections that follow, directions for how to ensure accurate data without deleting or altering essential data is provided.

Editing Client Information

Client Information

A client's "Universal Identifier Elements" is shared by all organizations participating in HMIS. It is collected in the "Basic Client Information" form (see below), and includes the following:

Basic Client Information and Demographics

- First Name
- Last Name
- Name Quality
- Social Security Number
- SSN Quality
- Birth Date
- DOB Quality
- Ethnicity
- Race

- Gender
- Veteran Status
- Relationship to Head of Household

<u>Steps to Navigate to the "Edit Client" Folder Menu</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".***

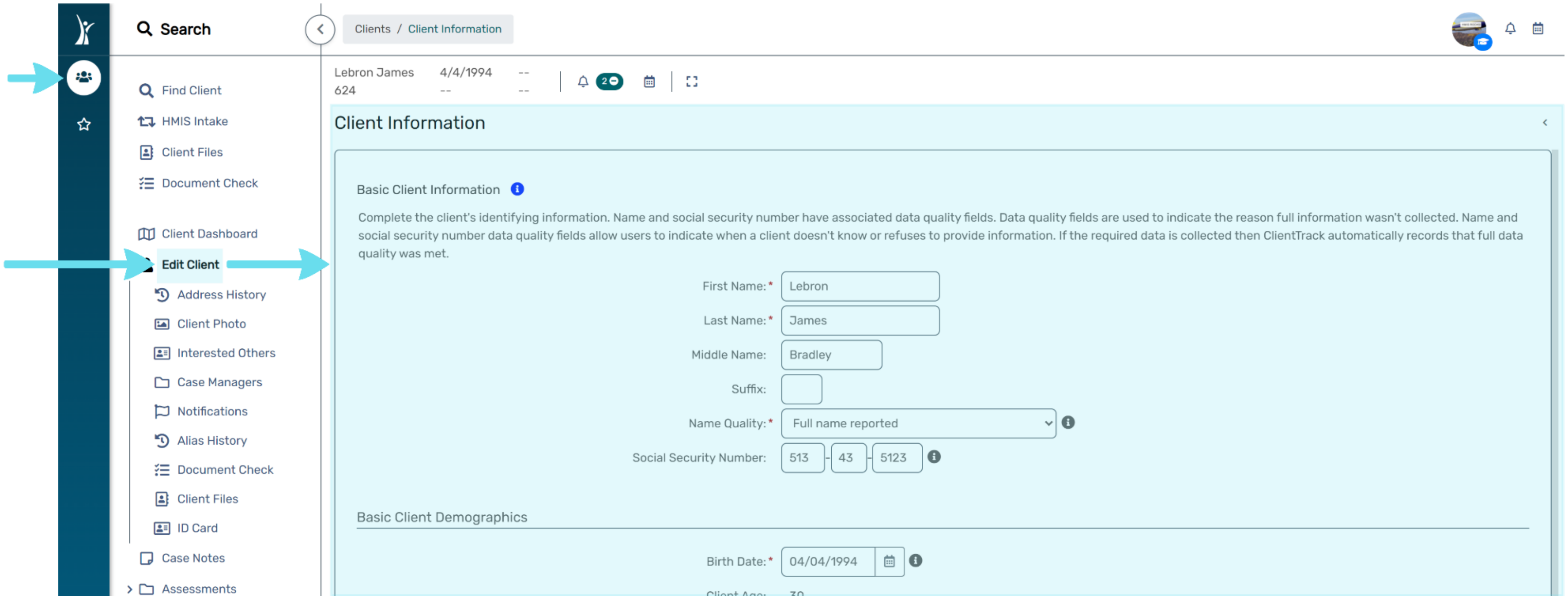
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/*Quick Search *in the* "HMIS Basic User 2025 Manual".

*** 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 "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" 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".



Edit Client – Client Information

Accessing/Editing Client's Basic Information

Tips and Tricks - *Viewing/Not Editing Information in ClientTrack*

- Anytime an intentional change isn't made, such as selecting a folder to view information only, click "Cancel" when available to avoid saving accidental changes.

Tips and Tricks – Viewing/Not Editing Information in ClientTrack

Tips and Tricks - *Editing Clients - Multiple Methods*

Changing or correcting any of this information will result in this information changing on the client's record, and for all of that client's enrollments across all agencies (whether or not they are the head of household.

- Method #1: Edit Client's Basic Information Through "Edit Client" Menu Option

- Method #2: Edit Client's Basic Information Through "Family Members" Menu Option

  Use Method #2 to edit more than one family/household member's basic information because it will display as a list, making it easy to identify if a specific data element does not match the rest of the family members.

  **Do NOT change the "Relationship to Head of Household" field using this method. This will cause errors in existing enrollments and subsequently any reporting relying on this information. Contact the HMIS Systems Team (hmis@changinghomelessness.org) for additional assistance.*

- Method #3: Edit Client's Basic Information Through "ESHC HMIS Intake" Menu Option

  Use this option only if the client and family members are being enrolled into a new program.

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".

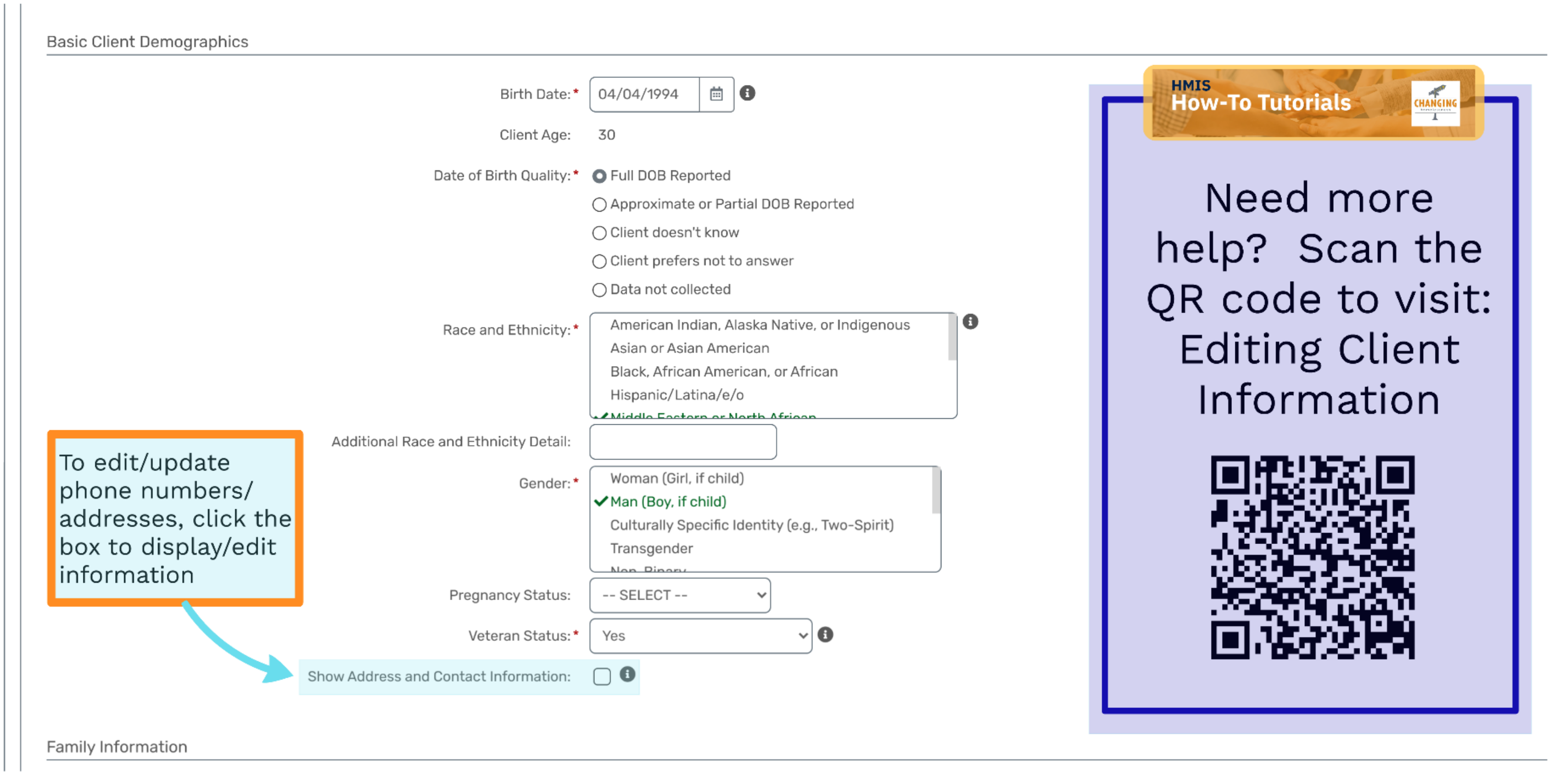
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* "HMIS Basic User 2025 Manual".

Step 2: Select the "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" 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".

Tips and Tricks - *Editing Client Address and Contact Information*

- To view/edit Client Address and Contact Information, click the “Show Address and Contact Information:” checkbox.



Tips and Tricks - *Editing Client Address and Contact Information*

- To view/edit Client Address and Contact Information, click the “Show Address and Contact Information:” checkbox.

HMIS How-To Tutorials

Need more help? Scan the QR code to visit: Editing Client Information

Tips and Tricks – Editing Client Addresses and Client Information

Step 3: Edit information as applicable. Click “Finish” to save changes. Click Cancel to exit without saving. ClientTrack will navigate to the “Client Dashboard” workspace container.