

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

Steps to Navigate to the “Edit Client” Folder Menu

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”.*

Lebron James 624 4/4/1994

Client Information

Basic Client Information

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name: Lebron

Last Name: James

Middle Name: Bradley

Suffix:

Name Quality: Full name reported

Social Security Number: 513 - 43 - 5123

Basic Client Demographics

Birth Date: 04/04/1994

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.

Basic Client Demographics

Birth Date: * 04/04/1994  

Client Age: 30

Date of Birth Quality: * ☒ Full DOB Reported
☐ Approximate or Partial DOB Reported
☐ Client doesn't know
☐ Client prefers not to answer
☐ Data not collected

Race and Ethnicity: *
American Indian, Alaska Native, or Indigenous
Asian or Asian American
Black, African American, or African
Hispanic/Latina/e/o
Middle Eastern or North African

Additional Race and Ethnicity Detail:

Gender: *
☐ Woman (Girl, if child)
☒ Man (Boy, if child)
☐ Culturally Specific Identity (e.g., Two-Spirit)
☐ Transgender
☐ Non-Binary

Pregnancy Status: -- SELECT --

Veteran Status: * Yes 

Show Address and Contact Information: ☐ 

To edit/update phone numbers/addresses, click the box to display/edit information



Family Information

HMIS
How-To Tutorials



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



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.

Client Information

Gender: • Woman (Girl, if child)
✓ Man (Boy, if child)
Culturally Specific Identity (e.g., Two-Spirit)
Transgender
None Please

Veteran Status: • Yes

Show Address and Contact Information: ☒ ⓘ

Contact Information

Address: Behind walmart on 103rd

Address 2:

City, State, Zip Code: City State Zip Code

Email: l.james@nba.com

Home Phone: 904-555-8458

Work Phone:

Msg Phone:

Family Information

Use this section to collect data about a client's family. The Family search field allows you to search for and select an existing family account. This is appropriate when adding a family member to an existing family.

To edit/update phone numbers/addresses, click the box to display/edit information

HMIS
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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.