Editing an Existing Enrollment

Workflow data may need to be updated or changed after a completed program enrollment* workflow. This section will cover the basics of editing specific types of information after an enrollment workflow has already been completed** for a currently open enrollment.

- * Client Enrollments: To learn how to navigate to the "Enrollments" folder, see Chapter 3: Home Workspace Menu Options, Folders, and Subfolders/Enrollments: Folder in the "HMIS Basic User 2025 Manual".
- ** For information on ClientTrack Workflows, see Chapter 5: Basics of Entering Data into ClientTrack/ClientTrack Workflows in the "HMIS Basic User 2025 Manual".

Tips and Tricks - Editing Workflows



- Workflows do not automatically update in certain cases which can cause data errors.
- For Enrollments: Once the "Program Enrollments" form workflow step is completed, editing any data from a a prior step in the workflow while still in the workflow will cause errors. Complete the workflow without editing incorrect data and email hmis@changinghomelessness.org to have the data corrected.

Tips and Tricks – Editing Workflows

Editing an Existing Enrollment: Adding a Housing Move in Date

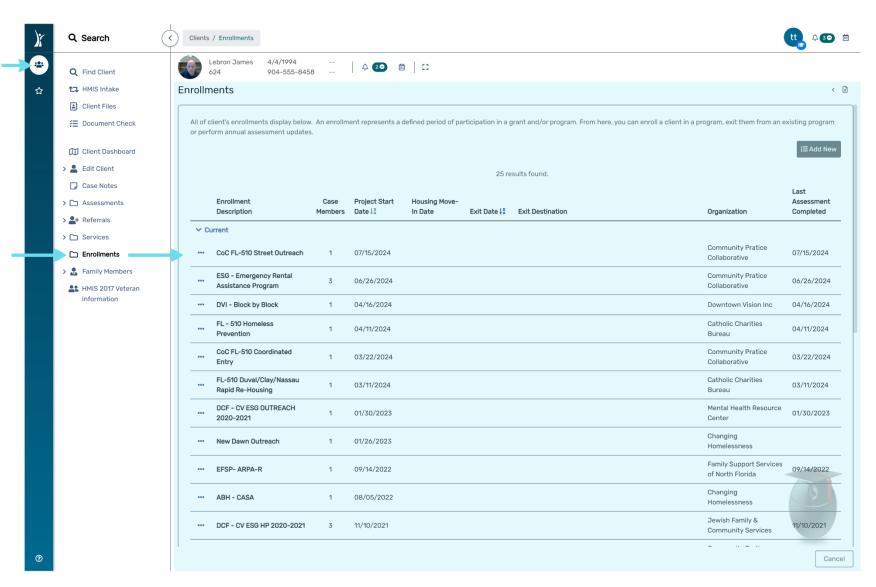
Steps to Adding a Housing Move in Date

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".

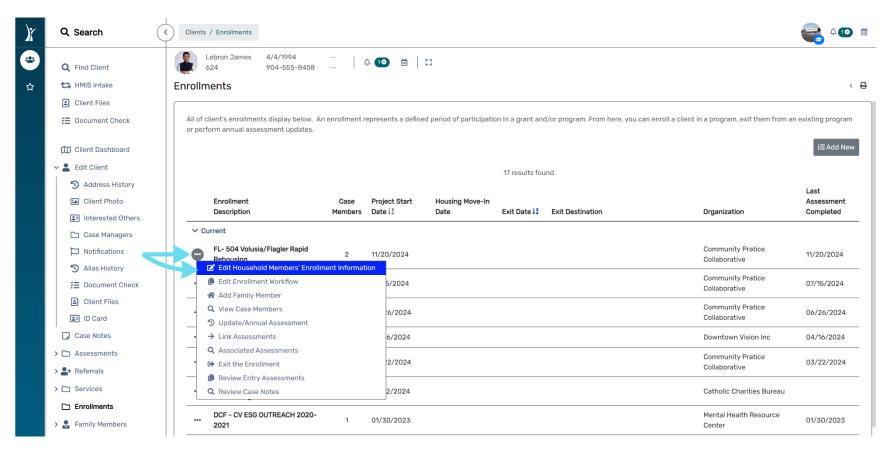
Step 2: Select the "Enrollments" secondary sidebar* menu option. ClientTrack will navigate to the "Enrollments" workspace container.

*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".



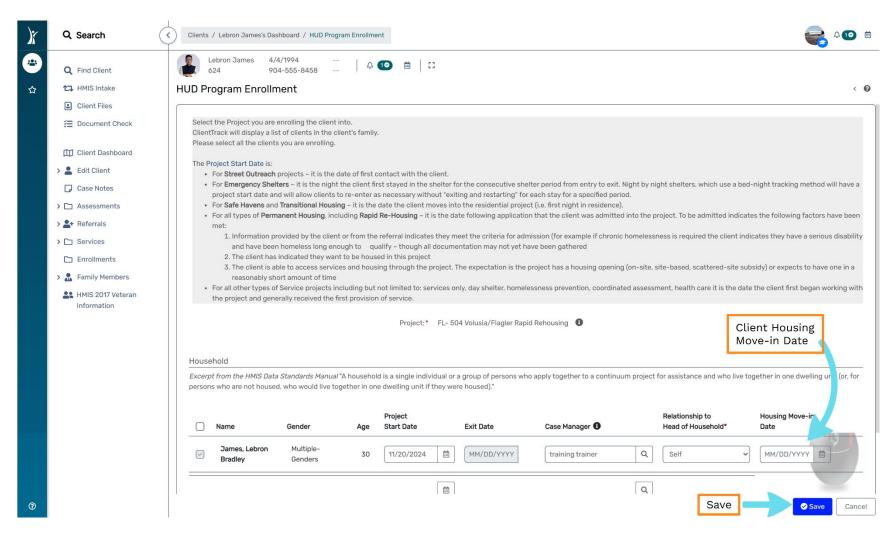
Step 3: Select the action button next to the appropriate enrollment. Select "Edit Household Members' Enrollment Information."

*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".



Edit Household Members' Enrollment Information

Step 4: Enter the Client's housing move-in date into the Housing Movie-in date box. Click "Save" to save changes. Click "Cancel" to exit without saving. ClientTrack will navigate to the "Enrollments" workspace container.



Entering and Recording Client Housing Move-In Date