

How to Edit Client Information

You can use these steps to edit a client’s basic information that appears at the top of their Client Dashboard and their identifying information such as date of birth or SSN.

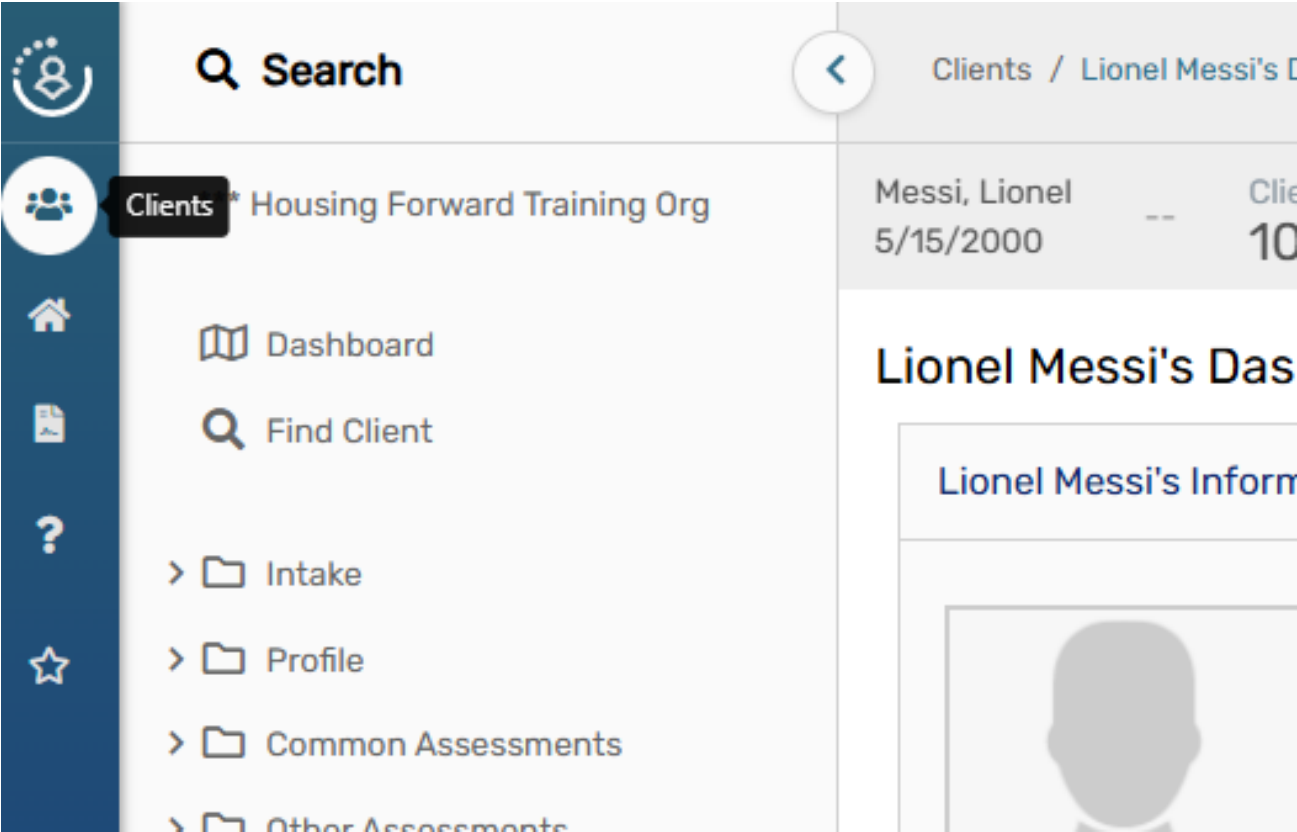
Use these steps to add or correct information such as:

- First and Last Name, or Alias
- SSN
- Date of Birth
- Ethnicity
- Race
- Gender
- Contact Information (Address, Email, Phone Number)

Do NOT use this page to correct Relationship to Head of Household or Veteran Status. Although these fields are editable from this page, this data is directly tied to program enrollments and should be edited from a workflow to avoid errors and ensure all of the required data for Head of Households and Family Members is collected.

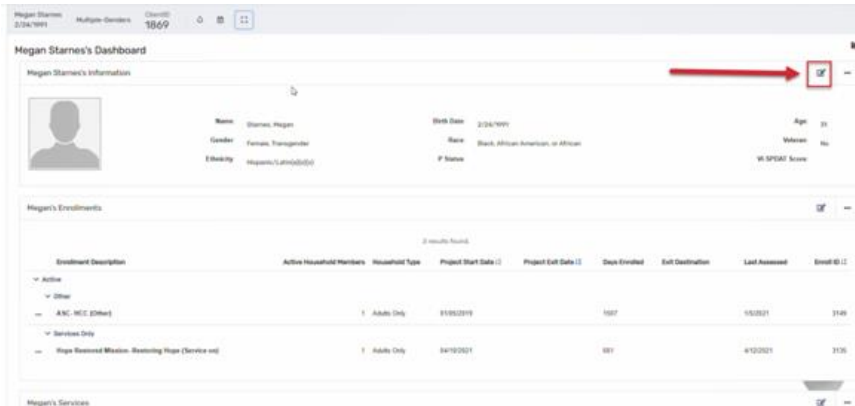
Steps to Edit

1. Navigate to your **Clients Workspace**.



2. Find your client using the **Search** or **Find Client**.

3. From your client's Dashboard, click the **edit button** in the Client Information section.



The screenshot shows the 'Megan Starnes's Dashboard' for Client ID 1869. A red arrow points to a small square edit button in the top right corner of the 'Megan Starnes's Information' section.

Megan Starnes's Information

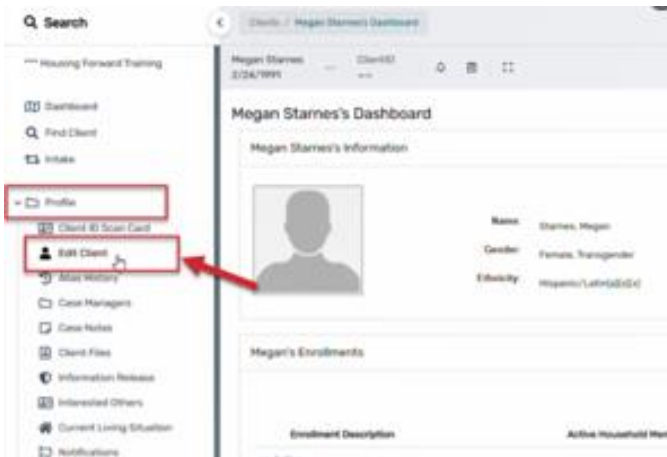
	Name Starnes, Megan	Birth Date 2/24/1991	Age 35
	Gender Female, Transgender	Race Black, African American, or African	Volunteered No
	Ethnicity Hispanic/Latino(a)	P Status	WSPSST Score

Megan's Enrollments

Enrollment Description	Active Household Members	Household Type	Project Start Date	Project End Date	Days Enrolled	Self-Destruction	Last Assessment	Enroll ID
Active								
Other								
AAC, HCT (Other)	1	Adults Only	1/15/2019		107		1/15/2021	1149
Services Only								
Hopewell Mission, Restoring Hope (Service only)	1	Adults Only	8/10/2021		99		8/10/2021	1136

OR

In the workspace menu, click **Profile** then **Edit Client**.



The screenshot shows the workspace menu on the left. The 'Profile' option is highlighted with a red box, and the 'Edit Client' option is also highlighted with a red box. A red arrow points from the 'Edit Client' option to the 'Megan Starnes's Dashboard' on the right.

4. Make the necessary edits to the client's information, then click **Finish** to save the page.



The screenshot shows the 'Client Information' form for Megan Starnes. The 'Finish' button is highlighted with a red box and a red arrow.

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 * Megan

Last Name * Starnes

Middle Name * null

Alias

Suffix

Name Quality * Full name reported

Social Security Number * 846 - 17 - 8465

SSN Quality * Full SSN

Client doesn't know

Client Refused

Data not collected

Basic Client Demographics

Birth Date * 02/24/1991

Client Age * 35

Date of Birth Quality * Full DOB Reported

Finish Cancel

