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.

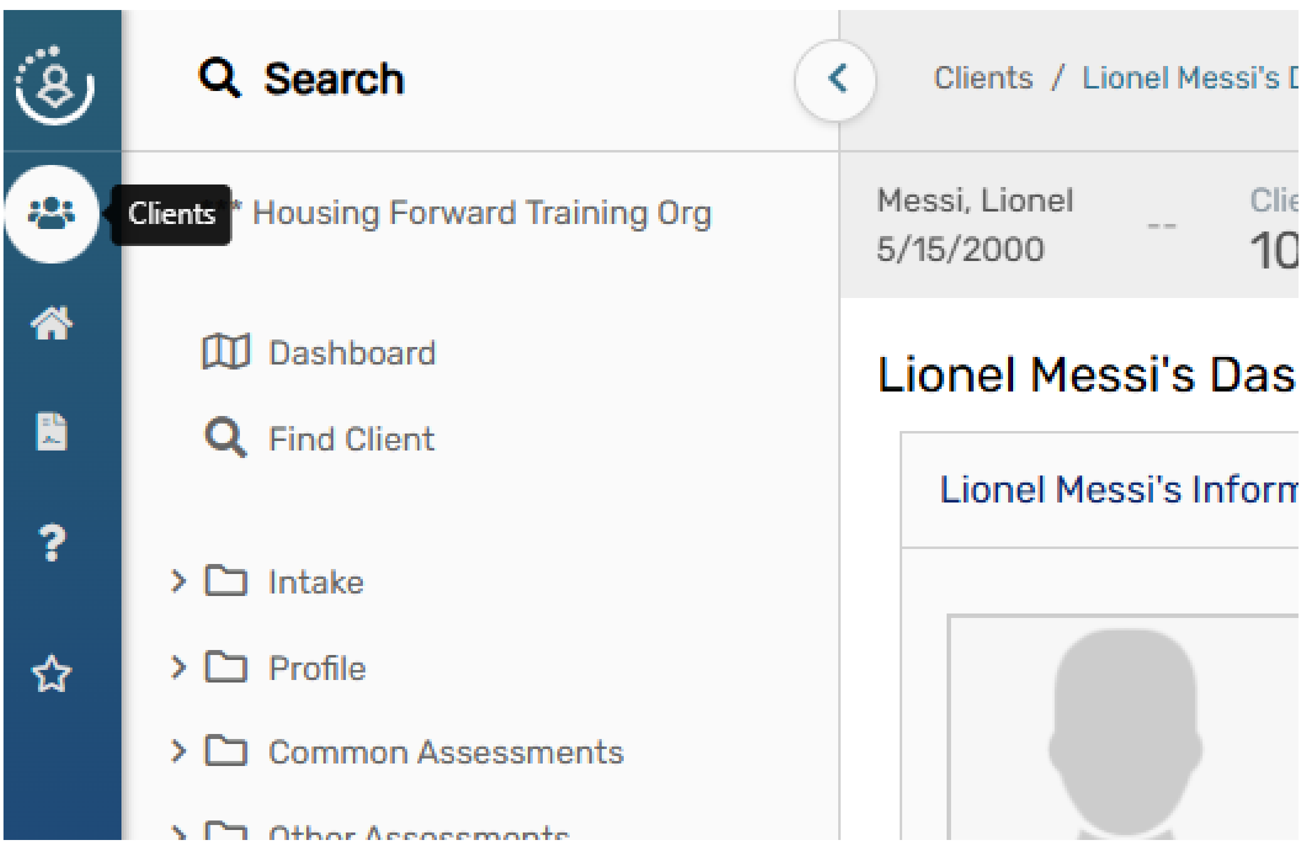
Use these steps to add or correct information such as:

- 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.

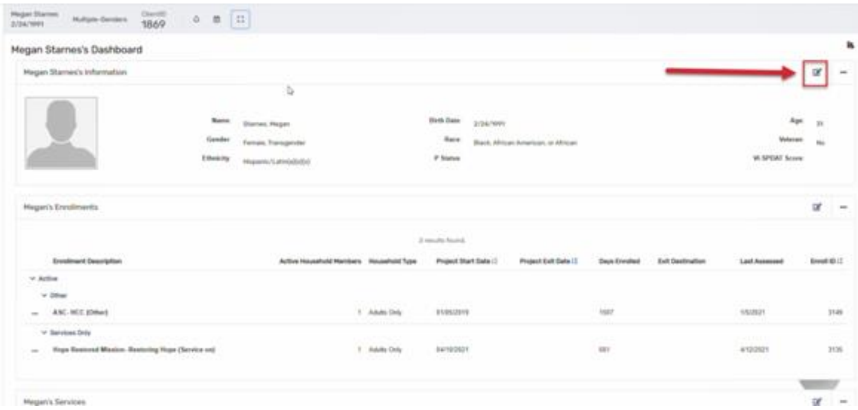
Steps to Edit

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



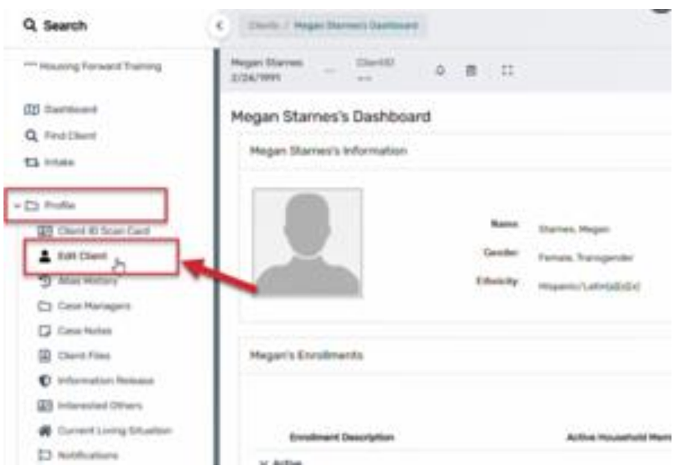
2. Find your client using the **Search** or **Find Client**.

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



OR

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



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