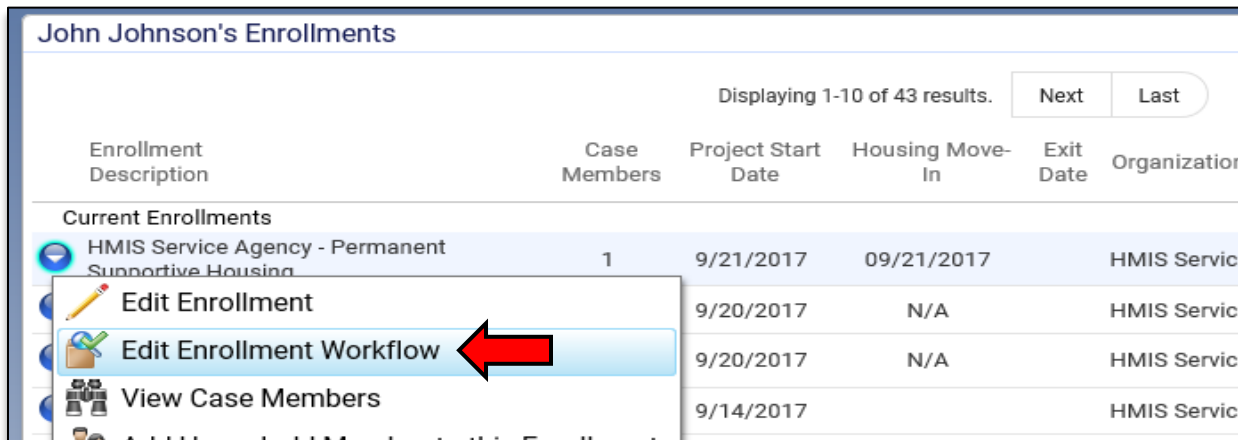# Edit Enrollment / Exit Workflow Feature

The following guide overviews the Edit Enrollment Workflow and Edit Exit Workflow features in the PA HMIS that can used to review/edit assessment information for Program Enrollment records.   While the Review Assessment and Assessment Summary screens will remain available, these edit functions can provide a more streamlined way to review and edit enrollment/exit information for clients.

Using these options can allow a user to go through the complete enrollment or exit process for a specific client (or family) which includes reviewing client demographics, enrollment/exit information as well as each individual assessment displayed during the original process.   Any assessment completed previously will show the information recorded and can be edited and any assessment not completed can be entered during these workflows.

Edit Enrollment Workflow:

This menu option is available for each Enrollment record in HMIS and can be located on the Client Dashboard or within the Project Enrollments screen by opening the action menu (blue ball).

When selecting this option the system will prompt you to review Client/Family Member information. Selecting Yes will load an abbreviated client profile screen and then take you to the Family Members screen to review/edit basic demographic information (i.e. Date of Birth, Ethnicity, Veteran Status, etc.).

Once the client/family member review is completed the system will take you to the beginning of the Enrollment process.   You can also select No and proceed directly to the Enrollment / Assessment process as well.

The first Enrollment screen will be the original screen used when performing the entry into the program and allows you to review/confirm this information.   This beginning screen is the same as the Edit Enrollment option within the action menu.

Once continuing the system will load the Entry Assessments for your client and cycle you through all the screens required as during the original enrollment process.   Any screen that contains data has already previous been completed, but any data can be altered before moving forward.   Any screen that does not contain data has not been previously entered and will need to be completed before moving forward.

Within the Workflow Menu on the left-hand side of the screen, the system will display the current assessment screen you are on and display the remaining ones you will cycle through before completion. Once you have completed the current assessment screen or have finished your review, hit save on the bottom of the screen to move forward.

Please note that the edit workflow logic is the same as the original enrollment process and assessments will be displayed based on the type of program, its funding and the age / household position of the client.

When editing an Enrollment that contains multiple family/case members, the system will loop through their assessments much like during the original enrollment. This can allow users to not only review a single client but the entire household.

Please note that when entering the Enrollment Assessment and other household members are included, the Head of Household while be the first client list.

Once the first client's assessments are completed, if more family members are included in the Enrollment, they will each be presented and their assessments will be shown in the Workflow Menu and the system will show their assessments steps as you go.

The process will automatically complete once you have gone through all the household members included in the enrollment. To end the process prior to reaching the end, we have placed a **Stop Edit Workflow** option at the bottom of each Universal (HMIS) Data Assessment screen for each client presented.

This option can be used to immediately stop the edit workflow process and place you back on the Client Dashboard of the current family member.   This can be helpful if you only need to edit/review a couple of the household members and do not need to review all of them.

Exit Edit Workflow:

This menu option is available for each Enrollment record that has been exited / discharged in HMIS (Enrollments that have a recorded Exit Date) and can be located on the Client Dashboard or within the Project Enrollments screen by opening the action menu (blue ball).

When selecting this option the system will go through the same process as explained above for Entry, except it will display all Exit Assessment screens associated with that specific program.

The system does prompt to review/edit Client/Family Member information and will display those screens if yes is selected.   If no is selected the workflow is place you directly on the beginning Exit screen.
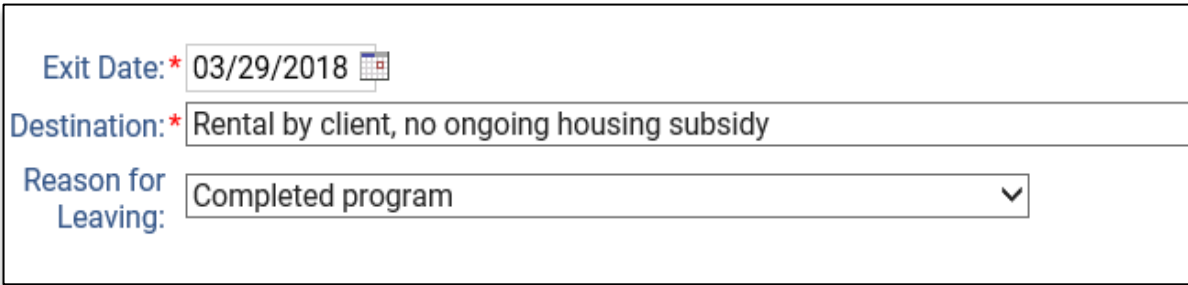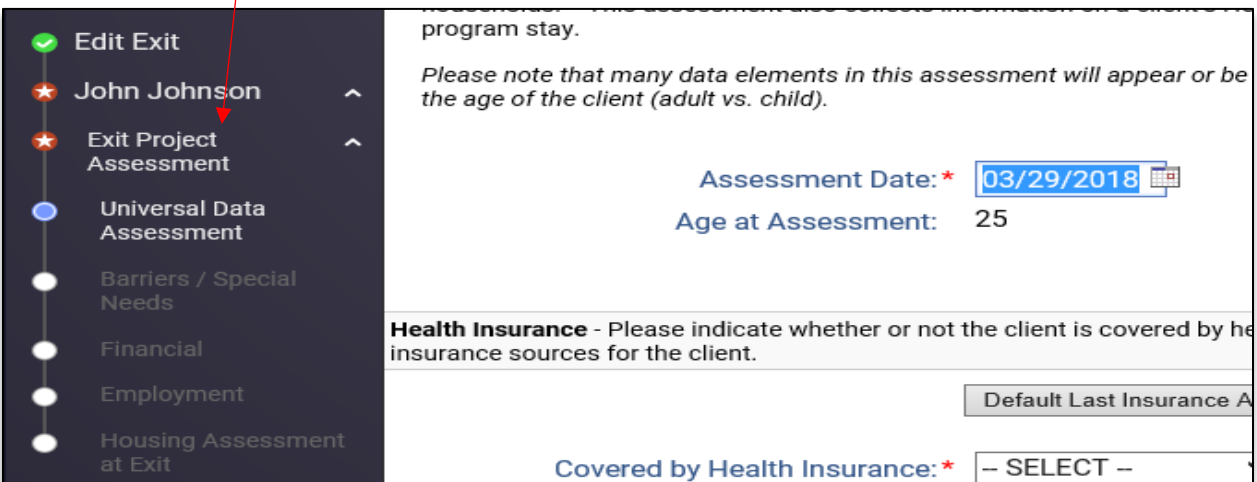
The first Exit screen will be the original screen used when performing the Exit from the program and allows you to review/confirm this information.   This beginning screen is the same as the Edit Exit option within the action menu.

Once continuing the system will load the Exit Assessments for your client and cycle you through all the screens required as during the original exit process.

Within the Workflow Menu on the left-hand side of the screen, the system will display the current assessment screen you are on and display the remaining ones you will cycle through before completion.

Once you have completed the current assessment screen or have finished your review, hit save on the bottom of the screen to move forward.

The Edit Exit Workflow will also show you any family members included in the Enrollment that have also Exited the program.   Once the first client's exit assessments are completed, if more family members are exited from the Enrollment, they will each be presented and their exit assessments will be shown in the Workflow Menu and the system will show their assessments steps as you go.

The process will automatically complete once you have gone through all the household members included in the enrollment, or when manually ended on any client using the **Stop Edit Workflow** option within the Universal (HMIS) Data Assessment.