



### CHANGE A CLIENT'S PROGRAMME START DATE

To check whether a client is associated with your programme, find the client record, then select [Action/Programmes](#). You will see something like this:-

Client: [Count Duckula \(Duc127996\)](#)

#### Programmes

Programme Name	Start Date	End Date	Client Status	Edit
Acme Training	21/06/2024	31/03/2025	Live	Edit

If your programme is not in the list, then **either**:-

- You **haven't completed a Registration Wizard** for the client. In this case select [Action/Wizards](#), click on [New Wizard](#) and **complete the registration wizard**.
- You **have completed a wizard** for the client but **have forgotten to select a programme** in the wizard. In **this case only** you can edit the Wizard using the **second method** below.

If your programme is in the list but the [Programme Start Date is wrong](#), use the **first method** below to update.

### HOW TO CHANGE A PROGRAMME START DATE IN THE CLIENT RECORD

- Find the Client Record
- Select [Action/Programmes](#)
- You'll see a list of one or more Programmes, like this:-

Client Programmes

Manage programmes registered against client

Client: [Secret Squirrel \(Squ90450\)](#)

#### Programmes

Programme Name	Start Date	End Date	Client Status	Edit
Acme Made up for Training	01/03/2023	31/03/2026	Live	Edit
Acme Training	19/01/2023	31/03/2024	Live	Edit

- Click on the [Edit link](#) for the relevant Programme. **NB** Do not click on the programme name, if you do, you'll be editing the overall dates of the Programme, not the date the client started on the programme.
- You'll see a screen like this:-

## Client Programmes

Manage programmes registered against client

Client: [Count Duckula \(Duc127996\)](#)

### Edit Programme

Programme Name:	Acme Training <small>Populate dates from programme</small>
Start Date:	21/06/2024
End Date:	31/03/2025

[Save](#) [Delete](#) [Cancel](#)

- Update the [Start Date](#) and click on [Save](#).
- **NB** This will not update the Date of the [Started on Programme](#) activity for the client. In order that your reports are correct, it's advisable that you update this too:-
  - Select [Action/Activities and Outcomes](#)
  - Click on the relevant [Started on Programme](#) activity.
  - Scroll down and click on [Edit](#)
  - Change the [Activity Date](#) and click on [Save](#).

## HOW TO CHANGE A PROGRAMME START DATE IN A WIZARD

- [Find the Client Record](#), either in Client/Find Client or Quick Jump List
- Select [Action/Wizards](#)
- Click on the correct [Wizard Name](#)

Wizard Name
<a href="#">NOLB Post July 2022 - CCP</a>

This will take you back into the Wizard.

- Scroll down to the bottom and click on [Edit Wizard](#)

[Update with current Client Data](#) [Set Wizard Status](#) [Show Audit Log](#) [Edit Wizard](#) [Send Caseload Message](#) [Exit without save](#)

- Find the Programme question and click on the [Start Date](#):-

36: What programme will the client be working with and what date did they start with you? ⓘ

Programme	Start Date	End Date
<input checked="" type="checkbox"/> Acme Training	<a href="#">29/12/2023</a>	<a href="#">31/03/2025</a>
<input checked="" type="checkbox"/> Acme Made up for Training	<a href="#">29/12/2022</a>	<a href="#">31/03/2026</a>

- Correct the Start Date
- Scroll back to the bottom and click on [Save/Update Client and Wizard](#)

[Save Wizard Only](#) [Save / Update Client and Wizard](#) [Update with current Client Data](#) [Set Wizard Status](#) [Show Audit Log](#) [Send Caseload Message](#)  
[Exit without save](#)

- On the following screen, check the details are correct and update if necessary, then [click on Continue](#) to complete the process.

## Registration Wizard Status

Set the Registration Wizards details below

### Registration Wizard Caseload

Gordon Kilgour

Site Filter

### What is the Wizard's Status?

Complete

### What reference should be shown in Alerts?

Ned Flanders

The status affects whether or not the registration wizard will be shown as an alert. If mandatory fields are not completed then only statuses that do not make the wizard complete will be available.

Continue

- **NB** This will not update the Date of the [Started on Programme](#) activity for the client. In order that your reports are correct, it's advisable that you update this too:-
  - Select [Action/Activities and Outcomes](#)
  - Click on the relevant [Started on Programme](#) activity.
  - Scroll down and click on [Edit](#)
  - Change the [Activity Date](#) and click on [Save](#).