

Edit and Manage CommCare Data

Here are some features and tricks for how to deal with test data or accidental errors in form submissions. Keeping your dataset clean and correct on CommCare helps reduce time cleaning data in excel later.

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CommCareHQ Actions

Edit Submitted Forms

Projects that are on a Pro software plan or higher can use the [Data Cleaning: Clean Form Submission](#) feature. This allows project staff to make updates or corrections to forms that were previously submitted.

Archiving Forms

If a user submits a form that contains errors, one possible solution is to have them submit the form again with the correct information, and then archive the first form that was submitted.

Instructions on the process can be found on the [Archive Forms](#) page.

Advantages:

- Data from the incorrect form will be hidden from exports and reports
- Archiving a form undoes all of the case updates that occurred when a form was submitted
- Action is reversible if necessary

Disadvantages:

- Requires manually finding the form in CommCareHQ and choosing to archive it
- If subsequent forms have been filled out, and those forms were affected by erroneous case properties from the erroneous forms, the effect of those changes will still be present in the subsequent forms after archiving
- Will require filling out the form a second time

Closing Cases from CommCareHQ

Manually Closing Cases

If you need to close a case that was opened erroneously and cannot or do not want to have the mobile user close the case, it is possible to manually close the case from CommCareHQ.

Locate the case by using the Case List report. At the bottom of the page, below all of the case properties is the **Close Case** button. After pushing the button you will see a message at the top of the screen confirming that the case was closed. Note that the closed-on date will populate.

In order to undo the closing of the case go to the Case History and select the most recent form (it will say "system" in the Form column). Click on the "Archive Form" button to re-open the case.

Automatically Closing Cases

Create rules on CommCareHQ to automatically close cases that are no longer relevant. Read more [here](#).

Case Management

You can use [Case Management](#) to save anything you want to be able to edit to the case.

Advantages:

- User can quickly correct errors from the mobile
- Case export will always show the most recent version of a given case property

Disadvantages:

- Erroneous form submissions will still be present in form exports
- It may not be feasible to design an application that allows updating/correction of all fields

- If an erroneous answer impacted display conditions or other case management logic, then this approach may not undo everything.

Edit Form

An app can contain "edit" forms that load in the previous values of case properties, and allow users to update them. This then updates the value of the case property, so that the case details/export contain the most recent values. Details on the workflow can be found at [How can your user edit data](#) and a tutorial on how to create the Edit Form can be found at [Edit Form Tutorial](#).

Administrative Application

It is possible to create a CloudCare application that shares the same case type, and allows facility-based administrators to submit "edit" forms that update case properties. Details can be found at [Multiple Applications in a Project Space](#).

Excel Importer

If you are using a Standard CommCare Software Plan or higher, you can update case properties using the Excel Importer tool. Details can be found at the [Importing Cases Using Excel](#) page.