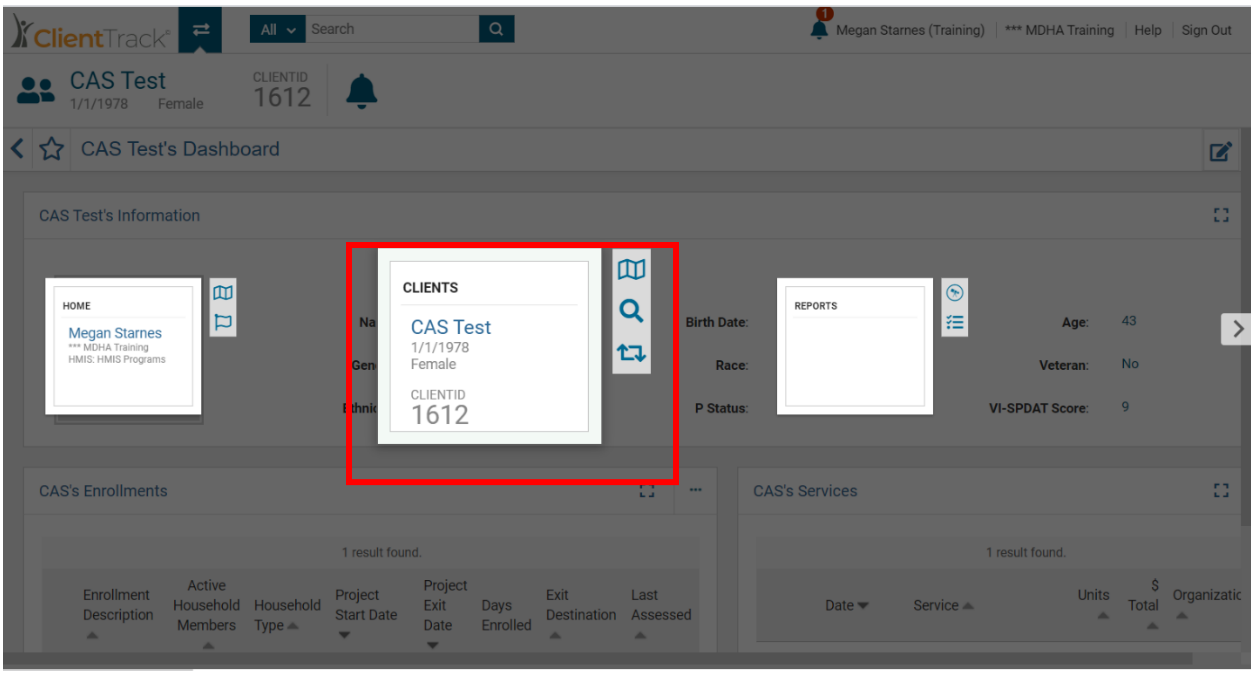
Uploading Client Files

Video Tutorial

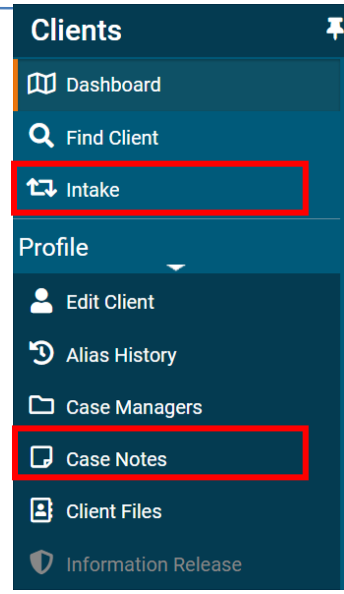
The Client Files feature functions as a system-wide digital file cabinet for items related to an individual client. Documents saved on the Client Files feature are shared in the same way as enrollment records, meaning other organizations will be able to access files you place on the client's record using Client Files.

NOTE: *NEVER* upload CAS documentation to Client Files, especially verification of disability or any document containing HIPAA sensitive information, such as a diagnosis. Use Document Check for these types of documents and file.

1. Log in to ClientTrack and navigate to your Clients workspace.

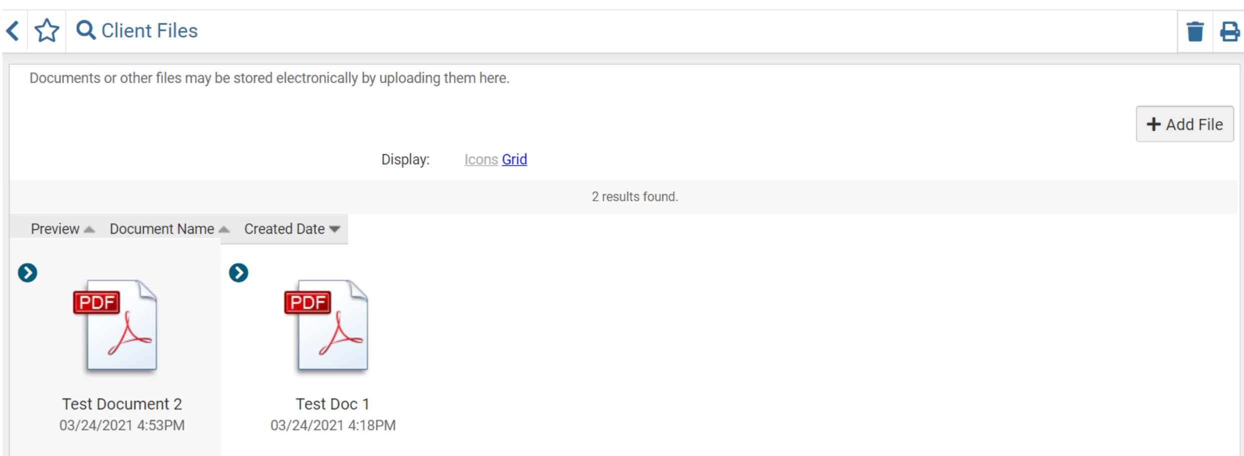


2. Find your client by searching using their name or client ID.



3. On the Favorites Menu, under Profile, select Document Check.

4. The Client Files page displays all files currently uploaded for this client. Use the Add File button to upload a new file. If you prefer, you can use the Grid view to view the documents in a list format and sort them using the filters on the screen.



5. Click Choose File to select a file from your computer to upload into HMIS. The Document Name will default to the same of the file you select, but you may change it by typing in a new Document Name. When you are ready, click Save.