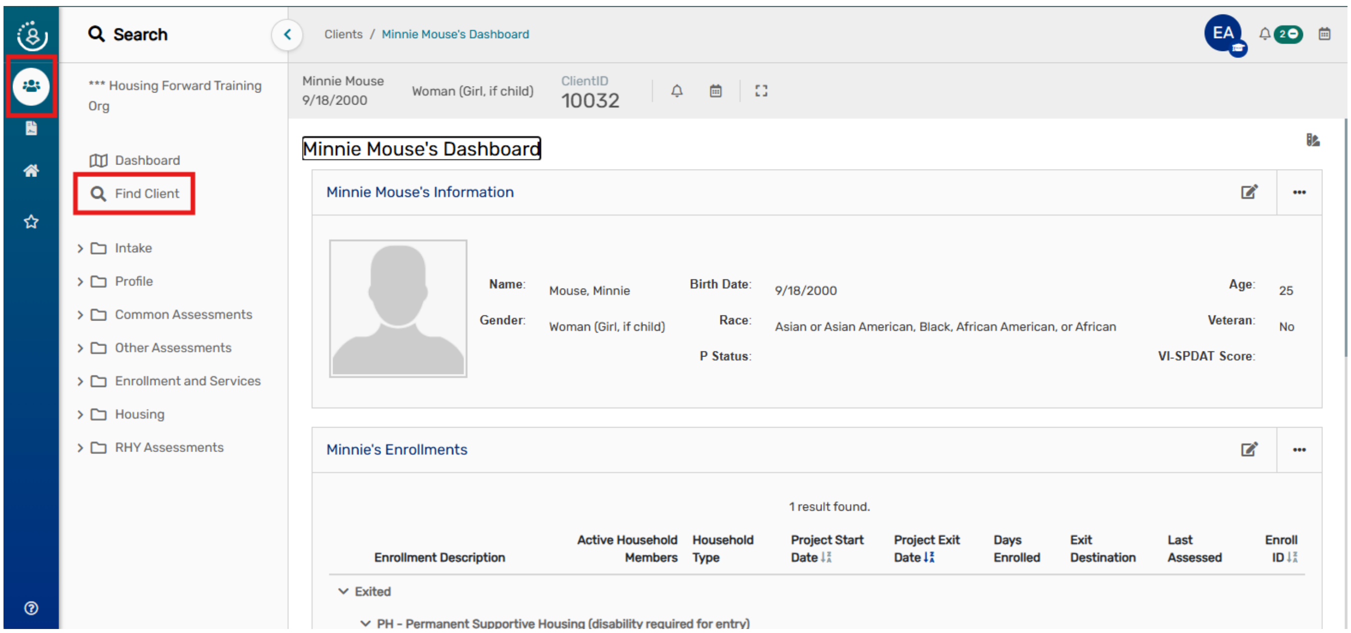
Uploading Client Files

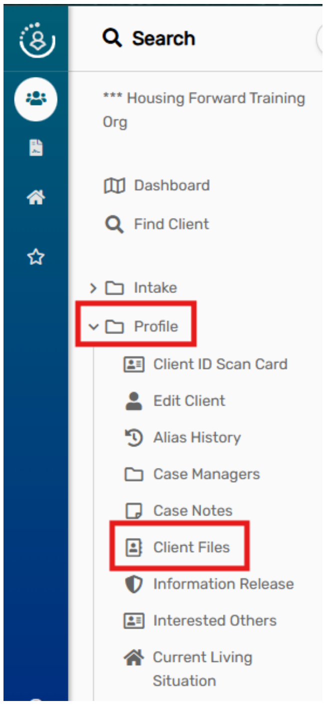
The Client Files feature functions as a system-wide digital file cabinet for items related to an individual client. Documents saved on the Client Files feature are shared in the same way as enrollment records, meaning other organizations will be able to access files you place on the client's record using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

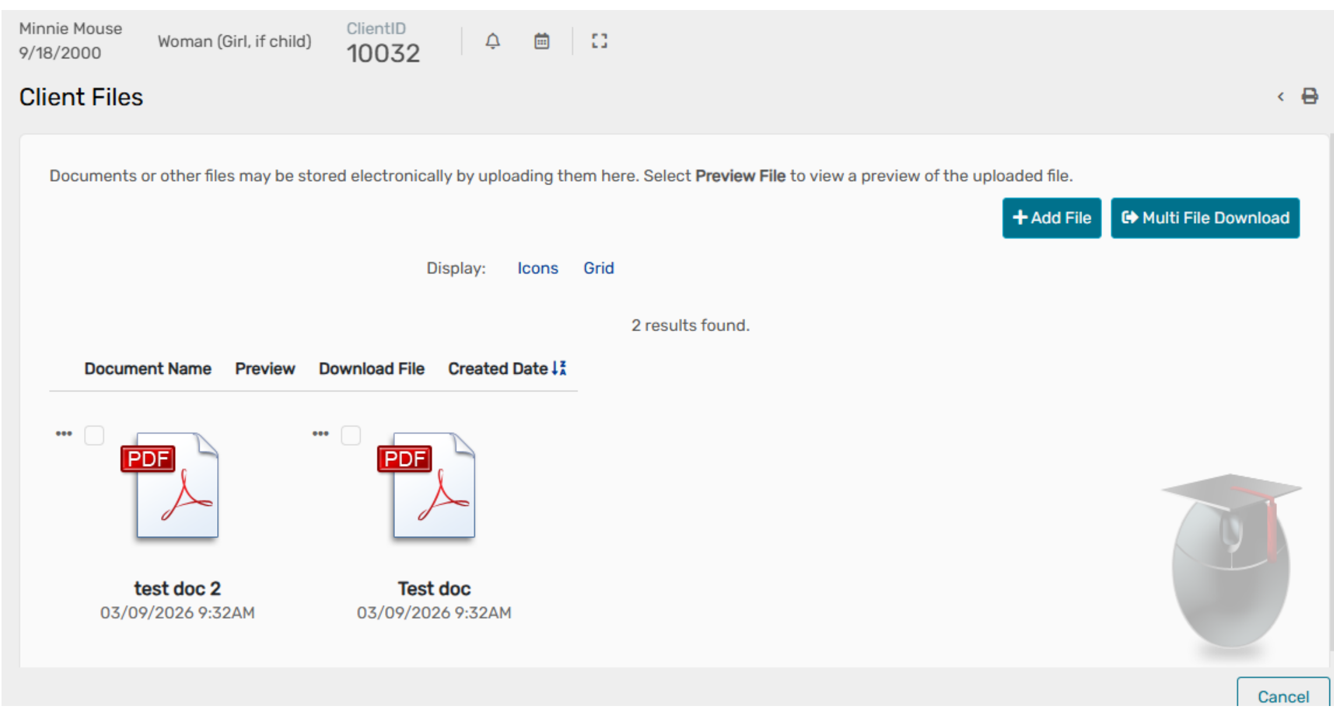
1. Log in to ClientTrack and navigate to your Clients workspace. Find your client by searching using their name or client ID.



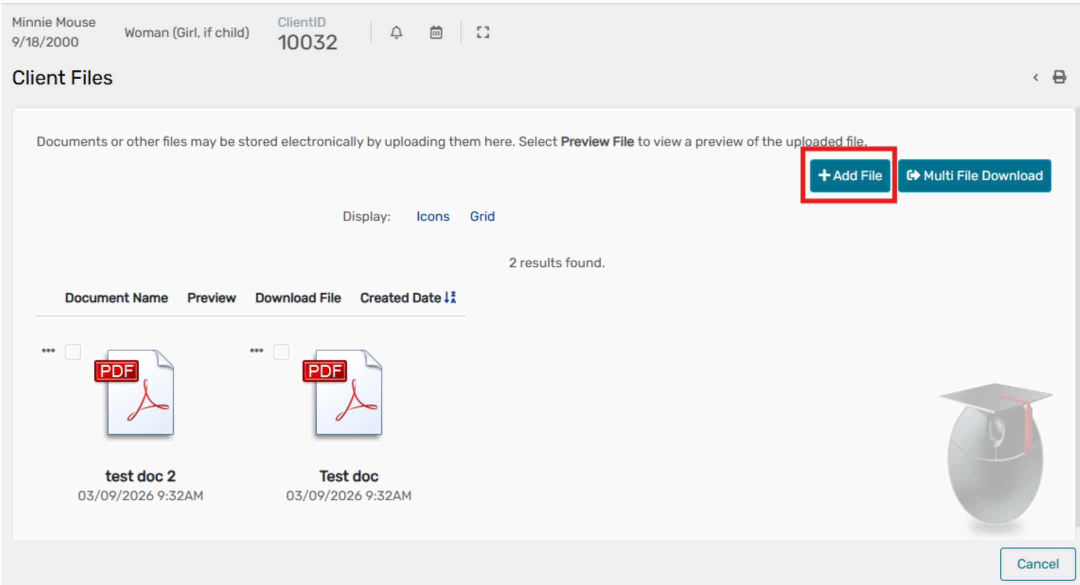
2. In the left hand menu, select Profile, and then Client Files.

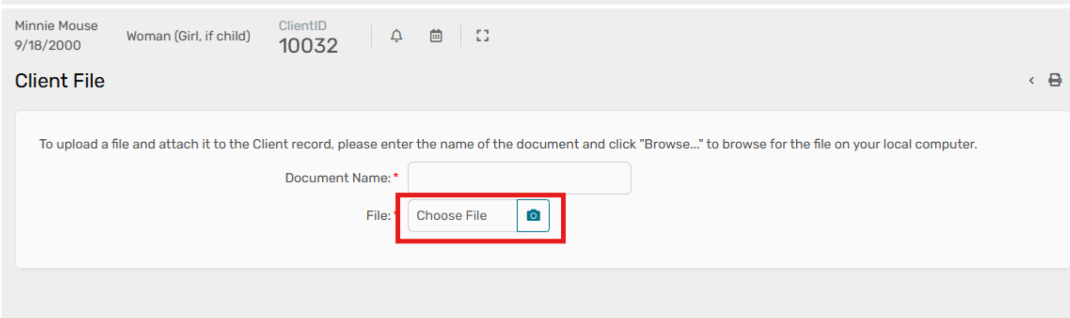


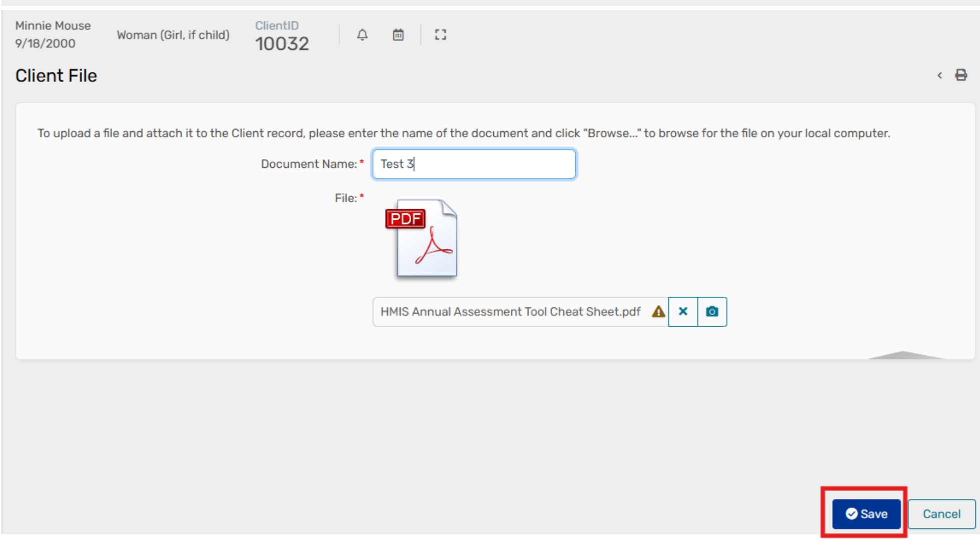
3. The Client Files page displays all files currently uploaded for this client. If you prefer, you can use the Grid view to view the documents in a list format and sort them using the filters on the screen.



4. Use the Add File button to upload a new file. 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.


Minnie Mouse
9/18/2000
Woman (Girl, if child)
ClientID
10032
Client Files
Documents or other files may be stored electronically by uploading them here. Select Preview File to view a preview of the uploaded file.
Add File
Multi File Download
Display: Icons Grid
2 results found.
Document Name Preview Download File Created Date
PDF
test doc 2
03/09/2026 9:32AM
PDF
Test doc
03/09/2026 9:32AM
Cancel


Minnie Mouse
9/18/2000
Woman (Girl, if child)
ClientID
10032
Client File
To upload a file and attach it to the Client record, please enter the name of the document and click "Browse..." to browse for the file on your local computer.
Document Name: *
File: *
Choose File


Minnie Mouse
9/18/2000
Woman (Girl, if child)
ClientID
10032
Client File
To upload a file and attach it to the Client record, please enter the name of the document and click "Browse..." to browse for the file on your local computer.
Document Name: *
Test 3
File: *
PDF
HMIS Annual Assessment Tool Cheat Sheet.pdf
Save
Cancel