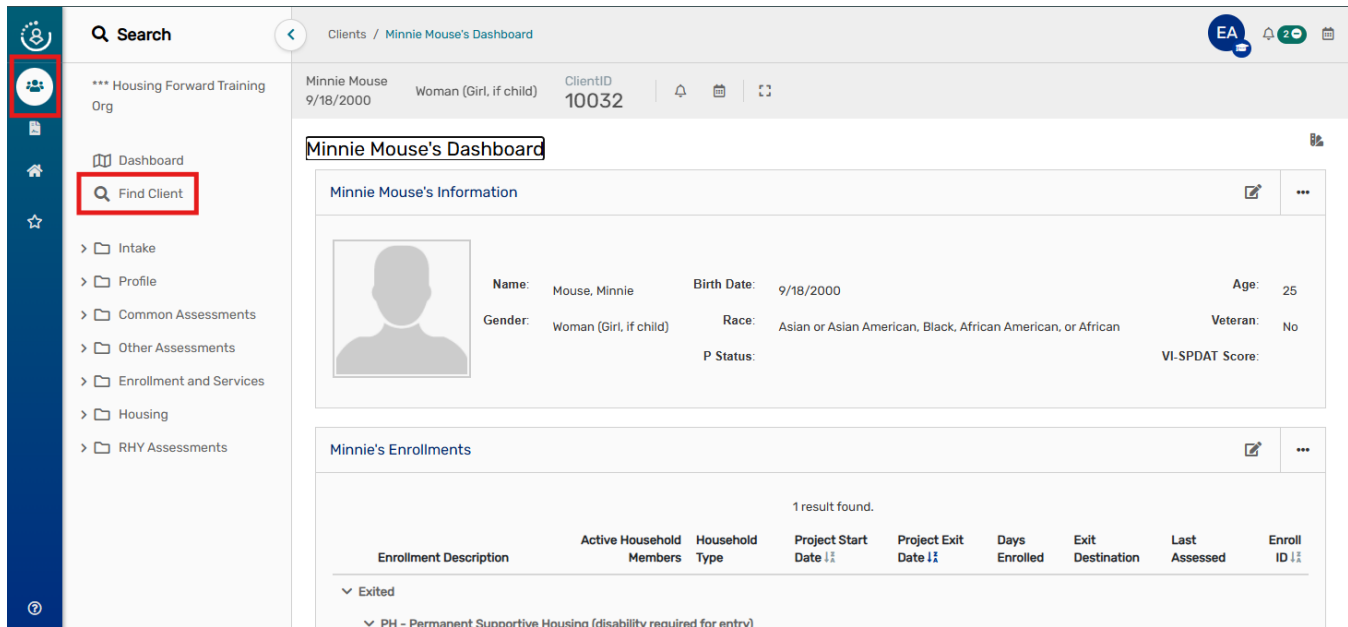


Uploading Client Files

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.

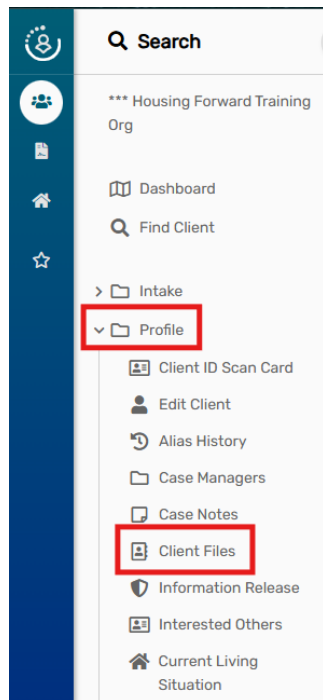
NOTE: NEVER upload CAS documentation to Client Files, especially verification of disability or any document containing HIPAA sensitive information, such as a diagnosis. Use Document Check for these types of documents and file.

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

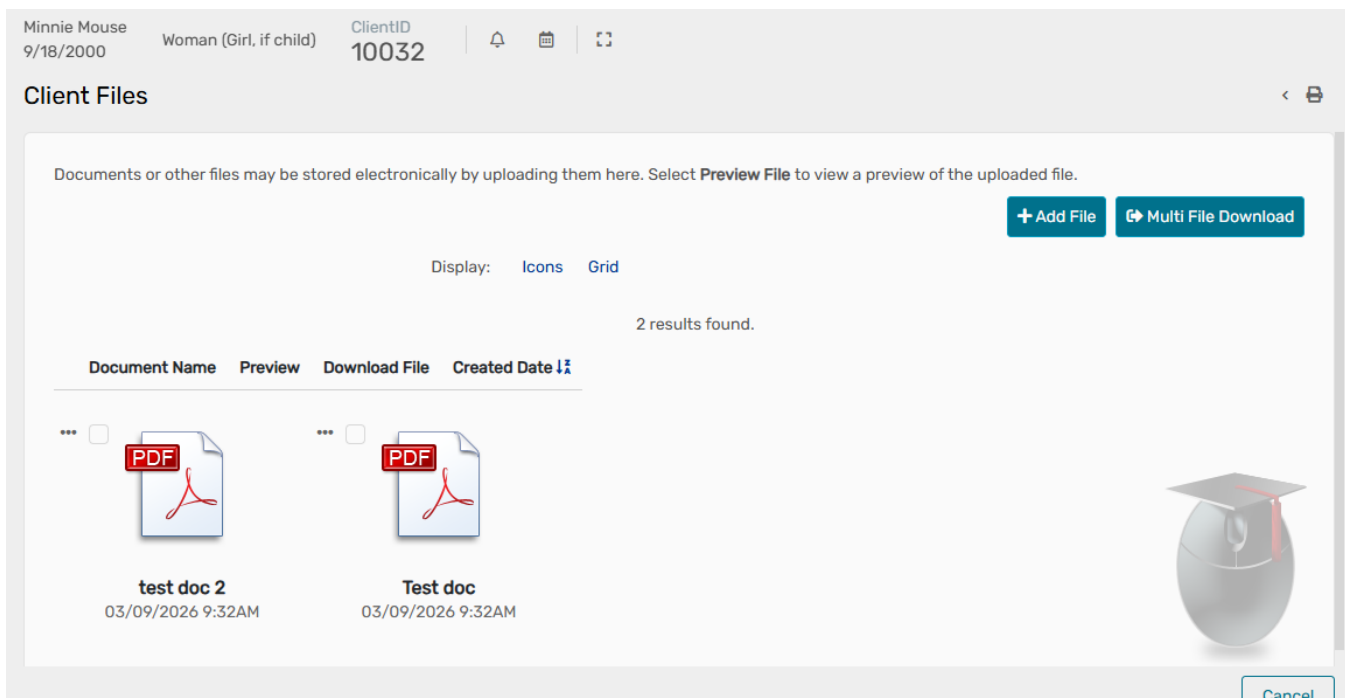


The screenshot shows the ClientTrack interface. On the left is a sidebar with a search icon and a list of navigation options: Dashboard, Find Client, Intake, Profile, Common Assessments, Other Assessments, Enrollment and Services, Housing, and RHY Assessments. The 'Find Client' option is highlighted with a red box. The main content area displays the 'Minnie Mouse's Dashboard' for a client named Minnie Mouse, born 9/18/2000, with ClientID 10032. The dashboard includes a section for 'Minnie Mouse's Information' with fields for Name, Birth Date, Age, Gender, Race, Veteran status, P Status, and VI-SPDAT Score. Below this is a section for 'Minnie's Enrollments' showing a table with 1 result found. The table has columns for Enrollment Description, Active Household Members, Household Type, Project Start Date, Project Exit Date, Days Enrolled, Exit Destination, Last Assessed, and Enroll ID. The first row is expanded, showing 'PH - Permanent Supportive Housing (disability required for entry)'.

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.

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

...



test doc 2

03/09/2026 9:32AM

...



Test doc

03/09/2026 9:32AM



Cancel

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



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: *



HMIS Annual Assessment Tool Cheat Sheet.pdf



Save

Cancel