

Recent: Subfolder

The “Recent” subfolder is a quick way to access any of the last 5 clients profiles accessed by the user in the system.

Steps to Navigate to the “Recent” Subfolder Menu

Step 1: Navigate to the Home Workspace*.

**To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “My ClientTrack” folder secondary sidebar* menu option. A dropdown menu will appear under the “My ClientTrack” folder.

** For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

Step 3: Select the “Recent” secondary sidebar menu option. ClientTrack will navigate to the “Choose a recent entity” workspace container.

The screenshot shows a software interface with a dark blue sidebar on the left containing a search icon and a list of menu items: User Dashboard, Standard Reports, My ClientTrack (with sub-items Active Cases and Recent), Chronic Homeless Status, Current Enrollments, My User Configuration, Paused Operations, My Submitted Issues, and HMIS Reports. The main content area is titled 'training trainer - ESHC HMIS Programs' and 'Community Practice Collaborative'. A light blue dialog box titled 'Choose a recent entity' is open, displaying a list of recent clients. The dialog includes a 'Clients' dropdown menu and a list of client cards. Each card shows a name and a date: 'Robinson, Mike Thursday, August 1, 2024', 'test, new Wednesday, July 31, 2024', 'James, Lebron Bradley Tuesday, July 30, 2024', 'James, Jimmy Tuesday, July 30, 2024', and 'Franks, Juliana Tuesday, July 30, 2024'. A 'Cancel' button is located at the bottom right of the dialog. Three orange callout boxes provide instructions: one points to the 'Clients' dropdown, another points to the client cards, and a third points to the 'Cancel' button. Light blue arrows also point from the 'Recent' menu item in the sidebar to the dialog box.

training trainer
Community Practice Collaborative - ESHC HMIS Programs

Choose a recent entity

Clicked to expand and see recent clients

Displayed below are the entities you've worked with recently. If you wish to work with the entity again, click the entity.

▼ Clients

Robinson, Mike Thursday, August 1, 2024	test, new Wednesday, July 31, 2024	James, Lebron Bradley Tuesday, July 30, 2024	James, Jimmy Tuesday, July 30, 2024
Franks, Juliana Tuesday, July 30, 2024			

Clicking within a box will take you to the client's profile in the Client Workspace

Click "Cancel" to return to the User Dashboard

Cancel

Recent Clients

Tips and Tricks - Recent Clients in "Quick Search"



Did you know?
- Your 5 most recent clients "Recent subfolder" can also be found in the "Quick Search" window's call-out bar.

