Client Files: Folder

Tips and Tricks - *Client Files and Document Check*

Changing Homelessness recommends using Document Check for storing files on HMIS vs. Client Files

Tips and Tricks – Client Files and Document Check

Steps to Navigate to the “Client Files” Folder Menu

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”.***

** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/*Quick Search *in the* “HMIS Basic User 2025 Manual”.

*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using “Find Client” *in the* “HMIS Basic User 2025 Manual”.

**** 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 “Client Files” secondary sidebar* menu option. ClientTrack will navigate back to the “Client Files” workspace container.

*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”.

Download, Edit Document Names, and Preview in Client Files

Option 1: Click on the action button* and select “Download File”, “Edit Document Name”, or “Preview File”.

**To view a list of icons and buttons used in Client Track HMIS, see Chapter:1: HMIS ClientTrack Basics/Key Terminology and Navigation/*Icons and Buttons in *the* “HMIS Basic User 2025 Manual”.

Option 2: Click on the Icon - To open a Client File, click on the icon of the document. This will download the file.

Upload Files in Client Files

Step 1: On the Client Files Page, click the “Add Files” button. For instructions on how to navigate to Client Files, see Client Files: Folder.

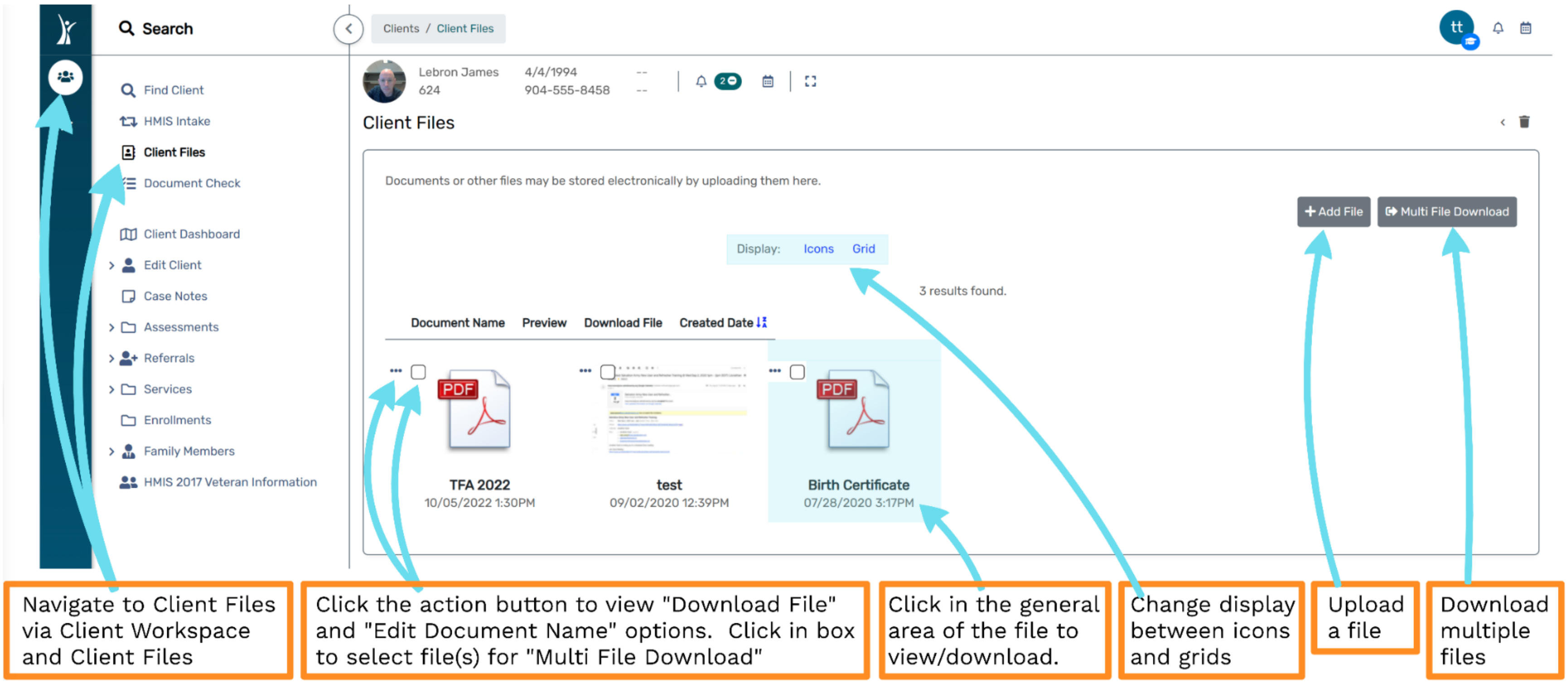
Step 2: On the following page, click the “Add File” button.

Step 3: Label the document in the “Document Name” box.

Step 4: Click the save button. ClientTrack will navigate back to the “Client Files” workspace container.

File Views in Client Files

Document views can be changed by clicking on “Icons” or “Grid”.



Client Files