

Client Dashboard: Folder

The “Client Dashboard” menu option on the *Client Workspace* provides a limited functionality* summary of a client’s profile. ClientTrack defaults to the “Client Dashboard” when the “Client Workspace” is initially selected. The “Client Dashboard” includes the following categories.

- Client Information**
- Client Enrollments***
- Client Services****

**Full versions of client information, enrollments, and client services are available in the Edit Client: Folder, Enrollments: Folder, and Services: Folder folders in the Client Workspace.*

***Client Information: To learn how to navigate to the “Edit Client” folder, see Chapter 4: Client Workspace Menu Options, Folders, and Subfolders/Edit Client: Folder in the “HMIS Basic User 2025 Manual”.*

****Client Enrollments: To learn how to navigate to the “Enrollments” folder, see Chapter 4: Client Workspace Menu Options, Folders, and Subfolders /Enrollments: Folder in the “HMIS Basic User 2025 Manual”.*

*****Client Services: To learn how to navigate to the “Services” folder, see Chapter 4: Client Workspace Menu Options, Folders, and Subfolders /Services: Folder in the “HMIS Basic User 2025 Manual”.*

Steps to Navigate to the “Client Dashboard” 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 Dashboard” secondary sidebar* menu option. ClientTrack will navigate to the client’s dashboard 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”.*

Search

Find Client

HMIS Intake

Client Files

Document Check

Client Dashboard

Edit Client

Case Notes

Assessments

Referrals

Services

Enrollments

Family Members

HMIS 2017 Veteran Information

Clients / LeBron James's Dashboard

Lebron James
624

4/4/1994
904-555-8458

--

--

Lebron James's Dashboard

Lebron James's Information

Name: James, Lebron Bradley

Birth Date: 4/4/1994

Age: 30

Gender: Man (Boy, if child), Questioning

Veteran: Yes

Race: Middle Eastern or North African, Native Hawaiian or Pacific Islander, White

Lebron's Enrollments

Displaying 1-10 of 25 results.

Next

Last

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed
Current							
CoC FL-510 Street Outreach	8	07/15/2024				Community Praticce Collaborative	07/15/2024
ESG - Emergency Rental Assistance Program	3	06/26/2024				Community Praticce Collaborative	06/26/2024
DVI - Block by Block	1	04/16/2024				Downtown Vision Inc	04/16/2024
CoC FL-510 Coordinated Entry	1	03/22/2024				Community Praticce Collaborative	03/22/2024
FL-510 Duval/Clay/Nassau Rapid Re-Housing	1	03/12/2024				Catholic Charities Bureau	
DCF - CV ESG OUTREACH 2020-2021	1	01/30/2023				Mental Health Resource Center	01/30/2023
New Dawn Outreach	1	01/26/2023				Changing Homelessness	
EFSP- ARPA-R	1	09/14/2022				Family Support Services of North Florida	09/14/2022
ABH - CASA	1	08/05/2022				Changing Homelessness	
DCF - CV ESG HP 2020-2021	3	11/10/2021				Jewish Family & Community Services	11/10/2021

Client Dashboard