Interested Others: Subfolder

The “Interested Others” menu option provides a way to document emergency contacts or other people that the client has agreed that agencies may contact in specific cases. This could be a guardian, a friend, a spouse or another service provider not in HMIS (the VA for example). Best practice is to make sure written consent is uploaded/on file of the client to connect with any interested others to communicate any information regarding the client. Please consult with your supervisor and/or program rules or reach out to hmis@changinghomelessness.org for further information.

Steps to Navigate to the “Interested Others” Subfolder 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 “Edit Client” secondary sidebar* menu option. ClientTrack will navigate to the “Client Information” workspace container, and a dropdown menu will appear under the “Edit Client” 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 "Interested Others" subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the "Interested Other" workspace container.

Adding an Interested Others

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".

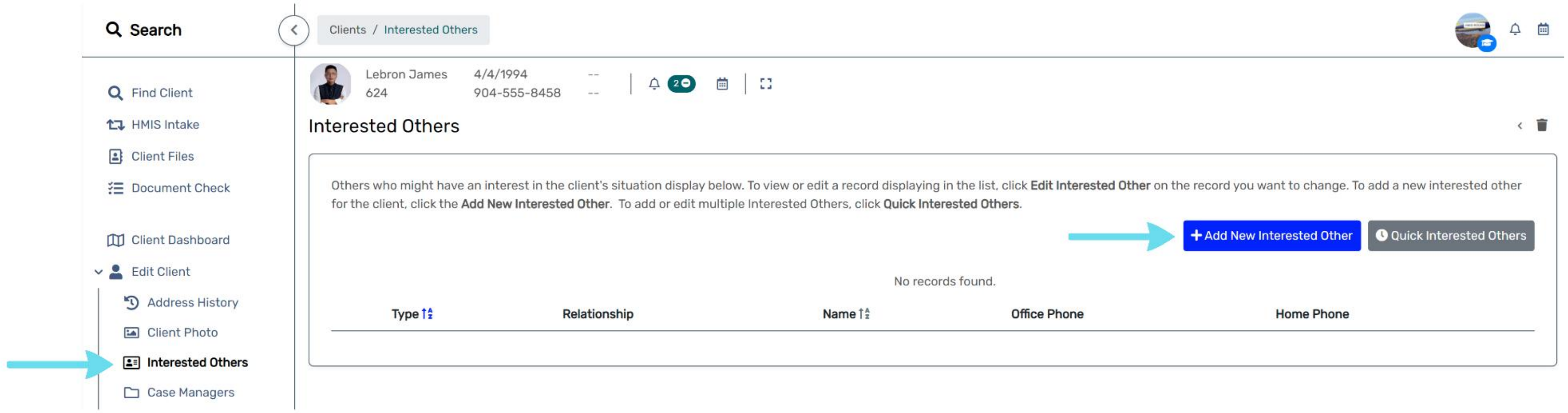
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* "HMIS Basic User 2025 Manual".

Step 2: Select the "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" 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 "Interested Others" subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the "Interested Other" workspace container.

Step 4: Click "Add New Interested Others". ClientTrack will navigate to the "Interested Others"



Add New Interested Other

Step 4: Complete all applicable fields. Required elements are marked with a (*).

Interested Others

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Others who might have an interest in the client's situation display below. To view or edit a record displaying in the list, click **Edit Interested Other** on the record you want to change. To add a new interested other for the client, click the **Add New Interested Other**. To add or edit multiple Interested Others, click **Quick Interested Others**.

Type/Description:* -- SELECT --

Relationship: -- SELECT --

Name:*

Interested client:

Aware of client's Situation: -- SELECT --

Contact Information

Enter the interested other's contact information below

Address :

City/State/Zip Code: City State Zip Code

Home Phone :

Office Phone :

Alt. Phone #:

Alt. Phone Type: -- SELECT --

E-mail Address:

Save Cancel

Add New Interested Other Form

Step 5: Click “Save” to save applicable information. Click “Cancel” to exit without saving.