

(Client) Notifications: Subfolder





Client notifications in ClientTrack allows important information to be featured on a notification bell icon* visible on the client’s “Client Workspace” entity bar**.

**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”.*

***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”.*

Tips and Tricks - Notification Icon and Priorities



- A notification with a low or medium priority will turn the notification icon turquoise. 
- A notification with a high priority will turn the notification icon red. 
- Multiple notifications will be displayed by a number in the icon. 
- Multiple notifications' color will default by highest priority heirarchy. 

Tips and Tricks – Notification Icon and Priorities

Steps to Navigate to the “Notifications” 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 “Notifications” subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the “Notifications / Alerts” page.

Viewing Client Notifications

There are two ways to view existing Notifications in a client’s record.

Method #1: [Viewing Client Notifications through the Notification Bell Icon](#)

Method #2: [Viewing Client Notifications through the Edit Client Menu](#)

Viewing Client Notifications through the Notification Bell Icon

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”.

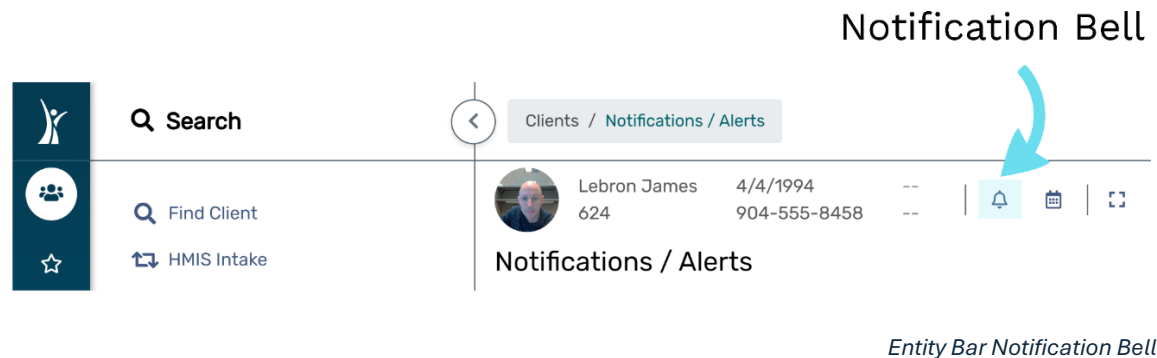
** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.

*** 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: Click on the notification bell* visible on the client’s “Client Workspace” entity bar**.

*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”.

**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: A call-out window will display any notifications created by clicking on the bell. To view all notifications, click on the notification bell icon in the call-out window.

Clients Notifications

Client was dismissed from program due to non-compliance

Today

Client was dismissed from program due to non-compliance - Client eligible to resubmit application in 1 year from notification date

Today

Clients / Notifications / Alerts

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4/4/1994

904-555-8458

Notifications / Alerts

Add New Notification / Alert

Only show current Notifications:

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Status:

✓ New/Pending

✓ Acknowledged

Complete

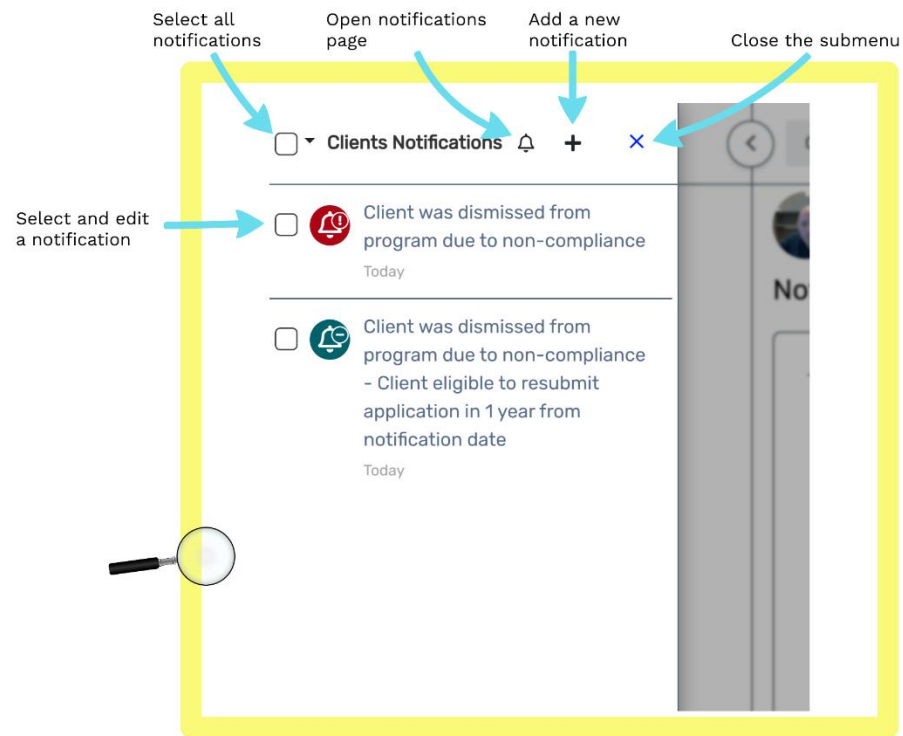
Canceled

2 results found.

Message	Priority	Notification Type	Begin Date	End Date
<div> <div></div> <div></div> <div>Client was dismissed from program due to non-compliance</div> </div>	High	No Contact	08/14/2024	
<div> <div></div> <div></div> <div>Client was dismissed from program due to non-compliance - Client eligible to resubmit application in 1 year from notification date</div> </div>	Medium	No Contact	08/14/2024	08/14/2025

Cancel

Client Notification Call-Out Window



Client Notification Call-Out Window Anatomy

Viewing Client Notifications through the Edit Client 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 “Notifications” subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the “Notification / Alerts” page.

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🔍 Search

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📥 HMIS Intake

📁 Client Files

📋 Document Check

📊 Client Dashboard

👤 Edit Client

🕒 Address History

📷 Client Photo

👥 Interested Others

📁 Case Managers

📋 Notifications

🕒 Alias History

📋 Document Check

📁 Client Files

📷 ID Card

📋 Case Notes

📁 Assessments

👤 Referrals

📁 Services

📋 Enrollments

👤 Family Members

👤 HMIS 2017 Veteran Information

Clients / Notifications / Alerts

🔍 Find Client

📅 HMIS Intake

📁 Client Files

📋 Document Check

📊 Client Dashboard

👤 Edit Client

🕒 Address History

📷 Client Photo

👥 Interested Others

📁 Case Managers

📋 Notifications

🕒 Alias History

📋 Document Check

📁 Client Files

📷 ID Card

📋 Case Notes

📁 Assessments

👤 Referrals

📁 Services

📋 Enrollments

👤 Family Members

👤 HMIS 2017 Veteran Information

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Notifications / Alerts

The current notifications recorded for the individual display below. To add a new notification click the **Add New Notification / Alert** button. To edit a notification, click the **Edit Notification / Alert** icon to the left of the desired notification.

+ Add New Notification / Alert

Only show current Notifications: ☒

Status:

✓ New/Pending

✓ Acknowledged

Complete

Canceled

No records found.

Message	Priority	Notification Type	Begin Date	End Date
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Cancel

Viewing Client Notifications

