Adding Client Notifications

There are two ways to add existing Notifications in a client's record.

Method #1: Adding Client Notifications through the Notification Bell Icon

Method #2: Adding Client Notifications through the Edit Client Menu

Adding 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 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".

Notification Bell
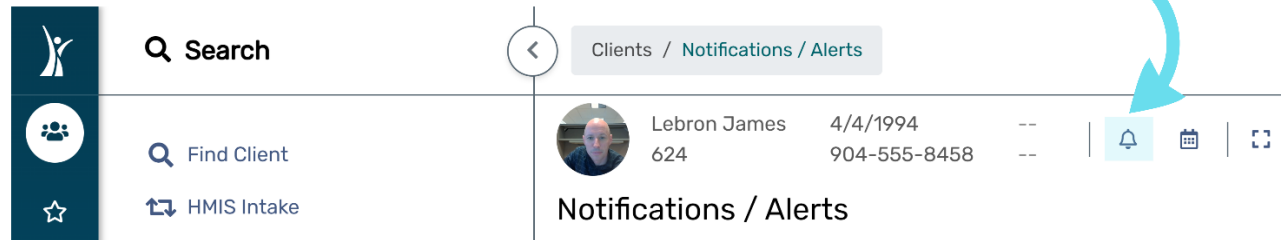
Entity Bar Notification Bell

Step 3: A call-out window will display any notifications created by clicking on the bell icon*. To add a notification, click on the add notification icon in the call-out window. An "Add Notification" pop-up window will appear.

*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".

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

Lebron James   4/4/1994
624   904-555-8458

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:
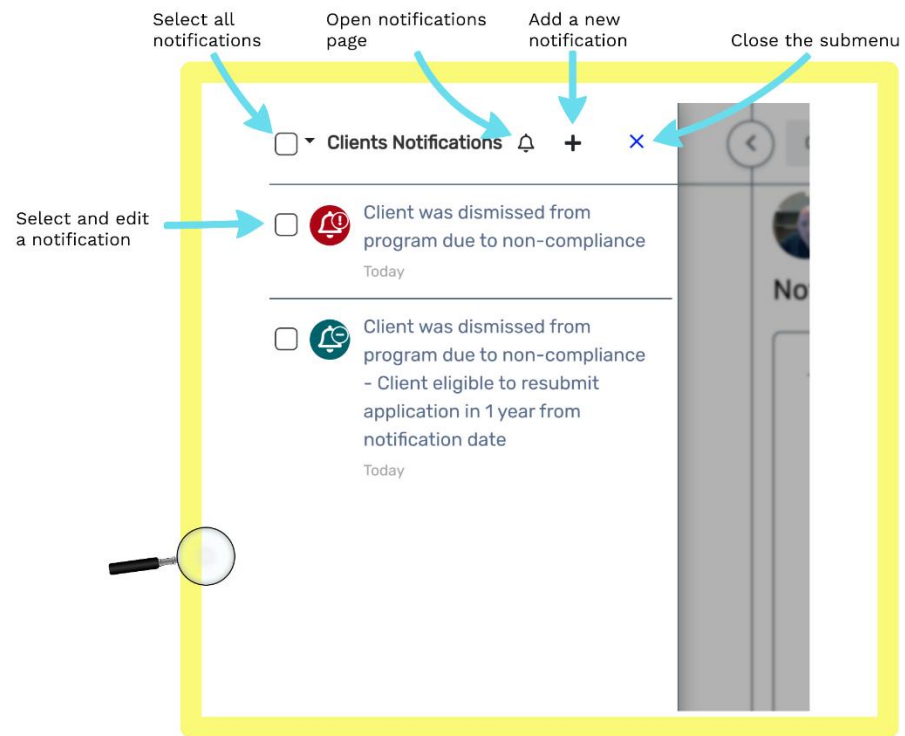✔ New/Pending
✔ Acknowledged
Complete
Canceled

2 results found.

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

Cancel

Client Notification Call-Out Window

Select all notifications

Open notifications page

Add a new notification

Close the submenu

Select and edit a notification

☐ ▾ **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

No

Client Notification Call-Out Window Anatomy

Click the plus sign to add notification

An Add notification windows will appear

Adding Client Notifications

Step 4: Complete the form as applicable. Required elements are marked with a (*).

Step 5: Click "Save". ClientTrack will navigate to the "Notifications / Alerts" workspace container.   The notification bell in the entity bar will update.

Adding 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" workspace container.

Step 4: Click the "Add New Notification / Alert" button*.

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".

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

Add New Notification through the Edit Client Folder

Step 6: A blank "Notification/Alert" form will appear. Complete the form as applicable. Required elements are marked with a (*).

Step 7: Click "Save". ClientTrack will navigate to the "Notifications / Alerts" workspace container. The notification bell in the entity bar will update.

Optional/Other Client Notification Settings

Lebron James   4/4/1994   --
624   904-555-8458   --

🔔 1⚫ 📅 | ⛶

Notification

Message: *   `Client out of town for 2 weeks for famil`

Notification Type: *
- ◯ Violence
- ◯ No Contact
- ⦿ Information
- ◯ Service Flag

Priority: *
- ◯ High
- ◯ Medium
- ⦿ Low

Begin Date: `08/16/2024` 📅   `AM`

End Date: `08/30/2024` 📅   `AM`

Status: *   `New/Pending ▾`

Status definitions

New/Pending: This label indicates to all agencies that this is a new Notification/Alert.

Acknowledged: indicates to all agencies that this is Notification/Alert has been viewed by all parties.

Complete: Indicates that the alert/notification is resolved.

Canceled: indicates the alert/notification was canceled (not applicable)

Status is, as of 2024, is "required" with a red asterisk, but is auto selected and can be left as is. Please check with your immediate supervisor to check if your company has guidelines regarding selecting statuts.

Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.

Schedule a future notification

Schedule(s) ☑

Time: `08/16/2024` 📅   `02:00 PM` to `02:30 PM`   Duration: `0.5 hours`   ✖

➕

Show Reminder: ☑   `2 weeks ▾`

Optional/Other Client Notification Settings