Alias History: Subfolder

The "Alias History" is a convenient way to catalog and keep track of any additional client names.

Steps to Navigate to the "Alias History" 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".

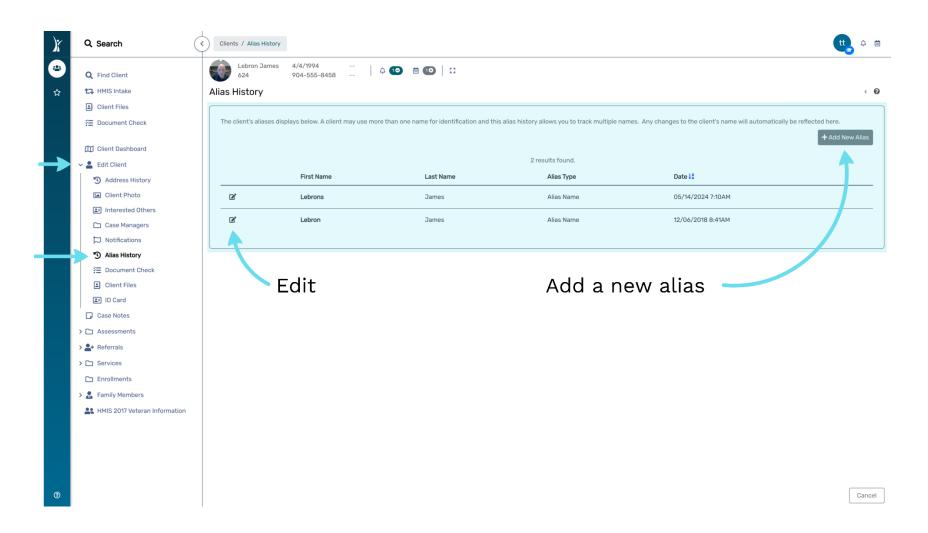
Step 2: Select the "Edit Client" secondary sidebar* menu option. ClientTrack will navigate to the "Client Information" workspace container, and a dropdown menu will appear under the "Edit Client" folder.

*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 "Alias History" subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the "Alias History" workspace container.

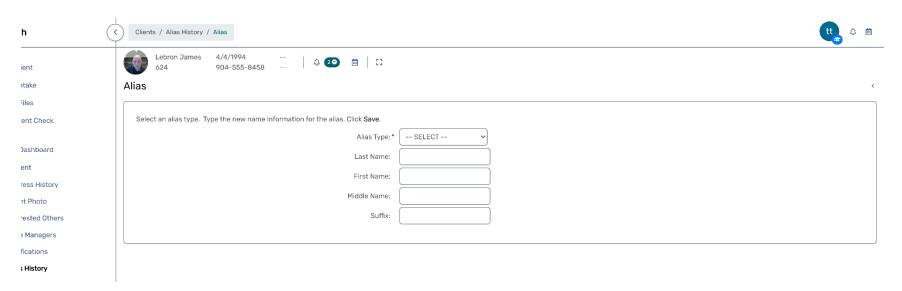
Steps to Add/Edit an Alias in the "Alias History" Subfolder Menu

Step 1: To view/edit/delete – Click on the edit icon next to the alias you'd like to view/edit/delete. To add a new alias – click the "Add New Alias" button at the top right side of the screen.



Editing and/or Adding New Alias

Step 2: Complete the form as applicable. Required elements are marked with a (*).



Editing and/or Adding New Alias Form

Step 3: Click "Save" to save any changes. Click "Cancel" to not save changes. ClientTrack will navigate back to the "Alias History" page.