

How to Upload Documents to HMIS/DV ClientTrack

1. Click on the **people icon** on the blue left-side menu and click on the **“Find Client”** tab on the left-side white menu as shown below. Then, **type the first couple letters of the client’s first and last name** to look for the client. Once you find your client, click anywhere on their name to go to their client dashboard.

Search

Clients / ClientTrack Form

Gummy Bear 2/26/2000 Social Security Number 312-98-0478 Client ID 1048318

Find Client

your search.

First Name: gu
Last Name: be

Middle Name:
Full Name (Last, First):
Social Security Number:
Birth Date: MM/DD/YYYY
Client ID:

1 result found.

First Name	Last Name	Middle Name	SSN	Birth Date
Gummy	Bear		XXX-XX-0478	02/26/2000

2. On the client dashboard, click on **“Client Profile”** on the left-hand menu, and then click on **“Client Files”** from the drop-down menu as shown below.

Search

Clients / Client Dashboard

Gummy Bear 2/26/2000 Social Security Number 312-98-0478 Client ID 1048318

Gummy Bear's Dashboard

Gummy Bear's Information

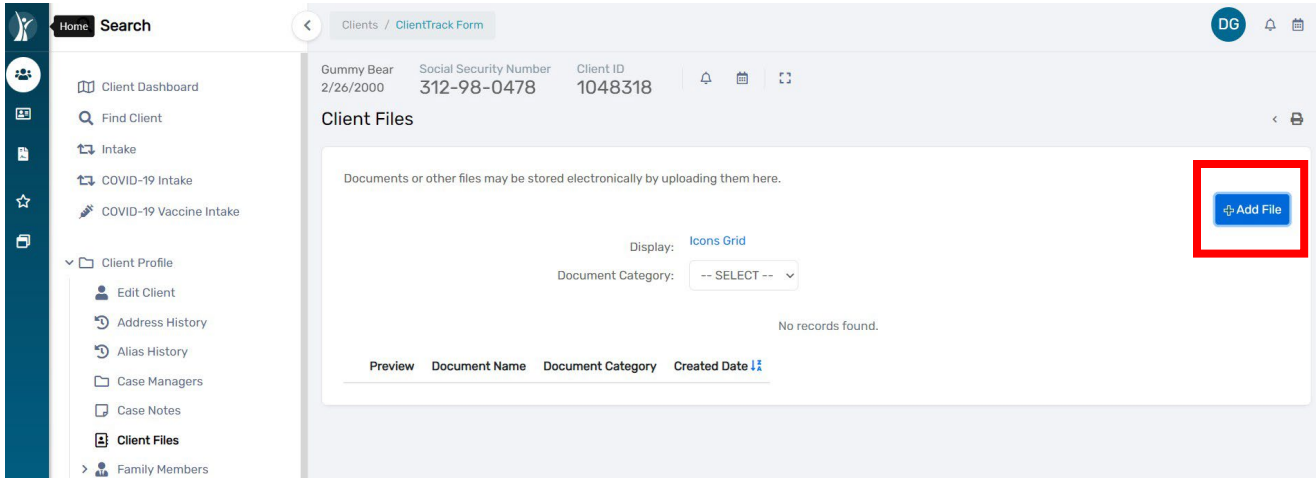
Name: Bear, Gummy Birth Date:
Gender: Male
Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) Race:

Gummy's Enrollments

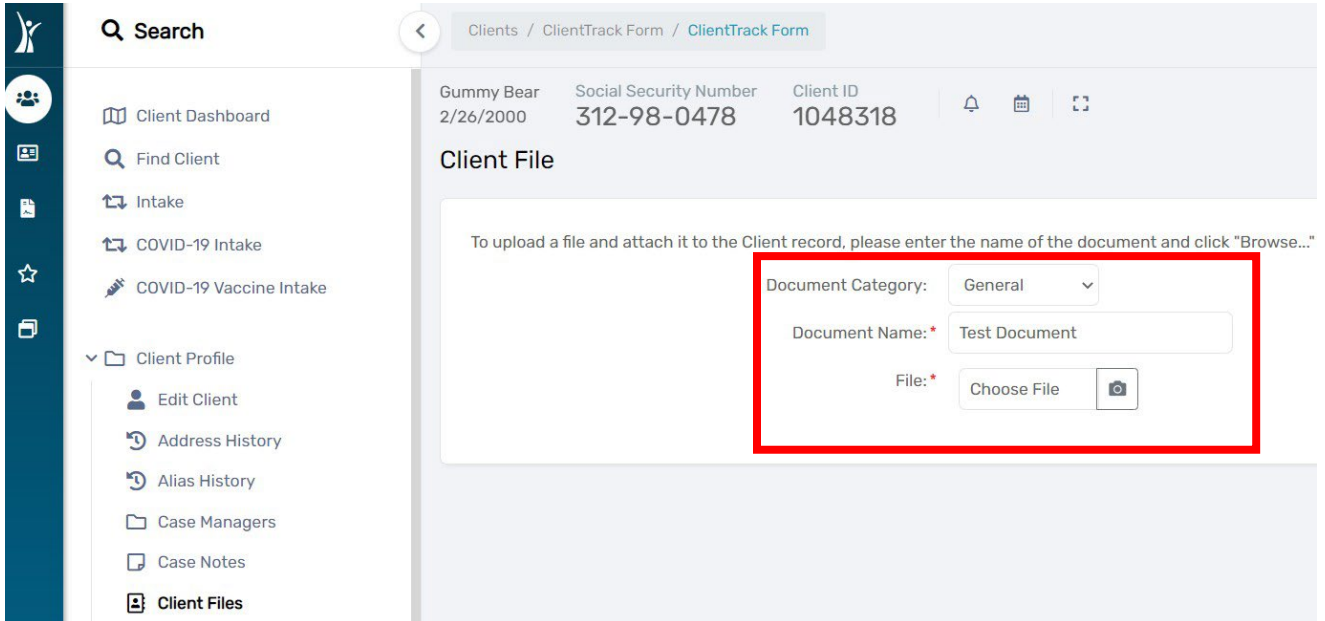
3 result

Enrollment Description	Case Members	Project Start Date ↓↑	Housing Move-In Date
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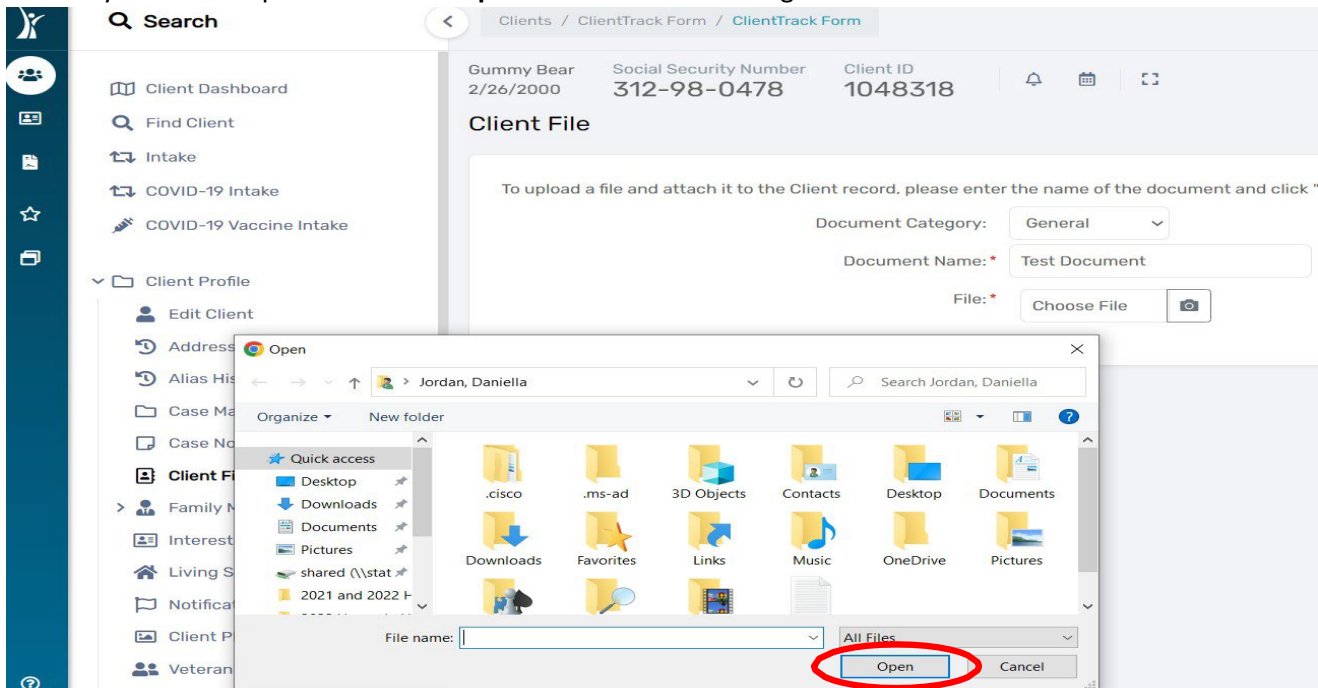
3. Click on the “+ Add File” button on the right side of your screen as shown in the image below.



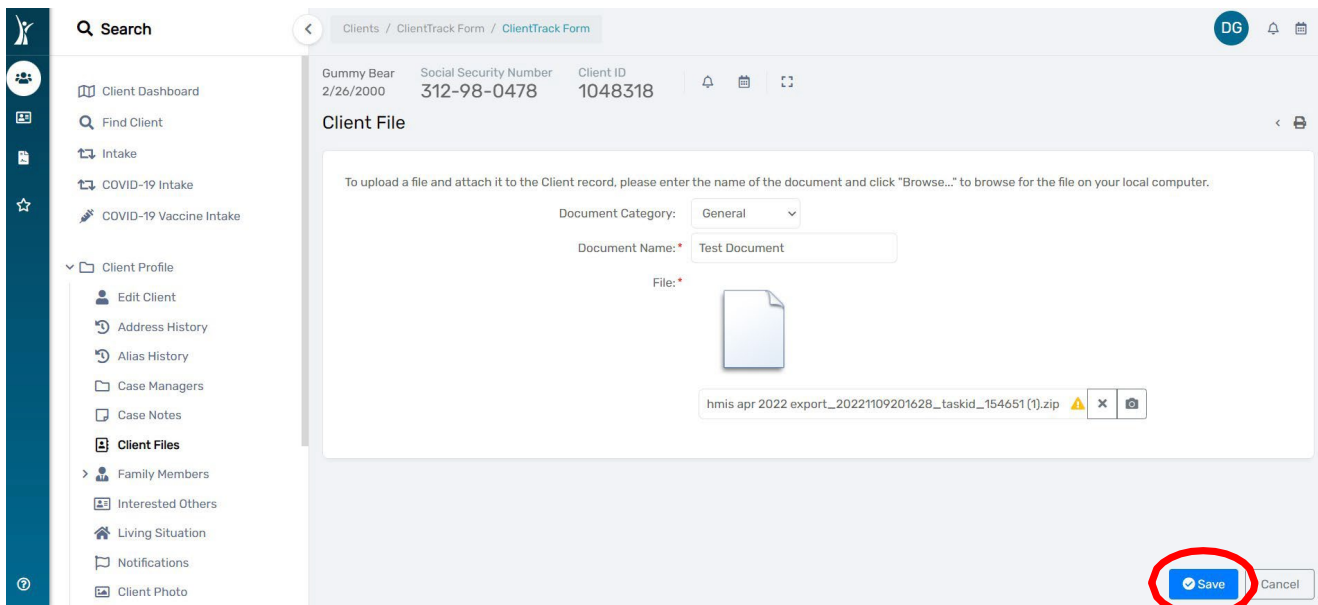
4. Choose the “Document Category” for the file. I chose “General”, but other options are “Financial”, “Education”, “Housing”, “Employment”, and “Identification”. Type in the name of the document you want to upload in the “Document Name” field. Finally, choose the file you want to upload by clicking on the “Choose File” button, shown in the image below. If you click on the “camera” icon, you can take a picture and upload it.



5. A pop-up window will appear showing your computer's saved documents. Choose the document you wish to upload and click **"Open"** as shown in the image below.



6. Finally, click the **"Save"** button found at the bottom right corner of your screen as shown in the picture below.



Your document is now uploaded to the Client's HMIS file.

For additional assistance, please email your respective helpdesk at: HMISHelpDesk@ihcda.IN.gov or DVHelpDesk@ihcda.IN.gov