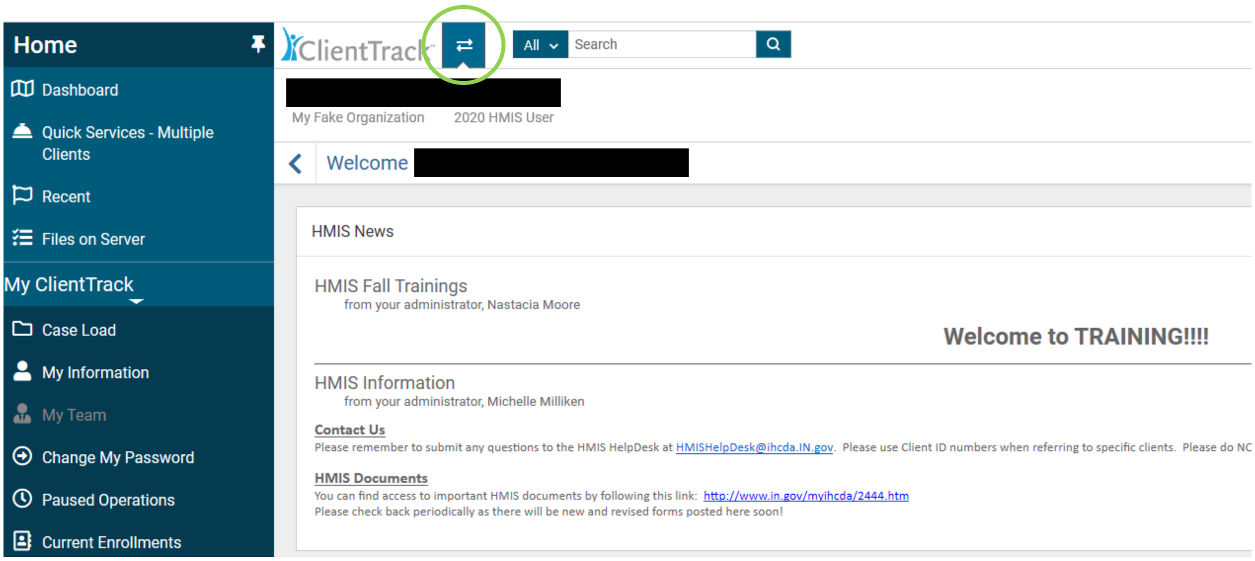
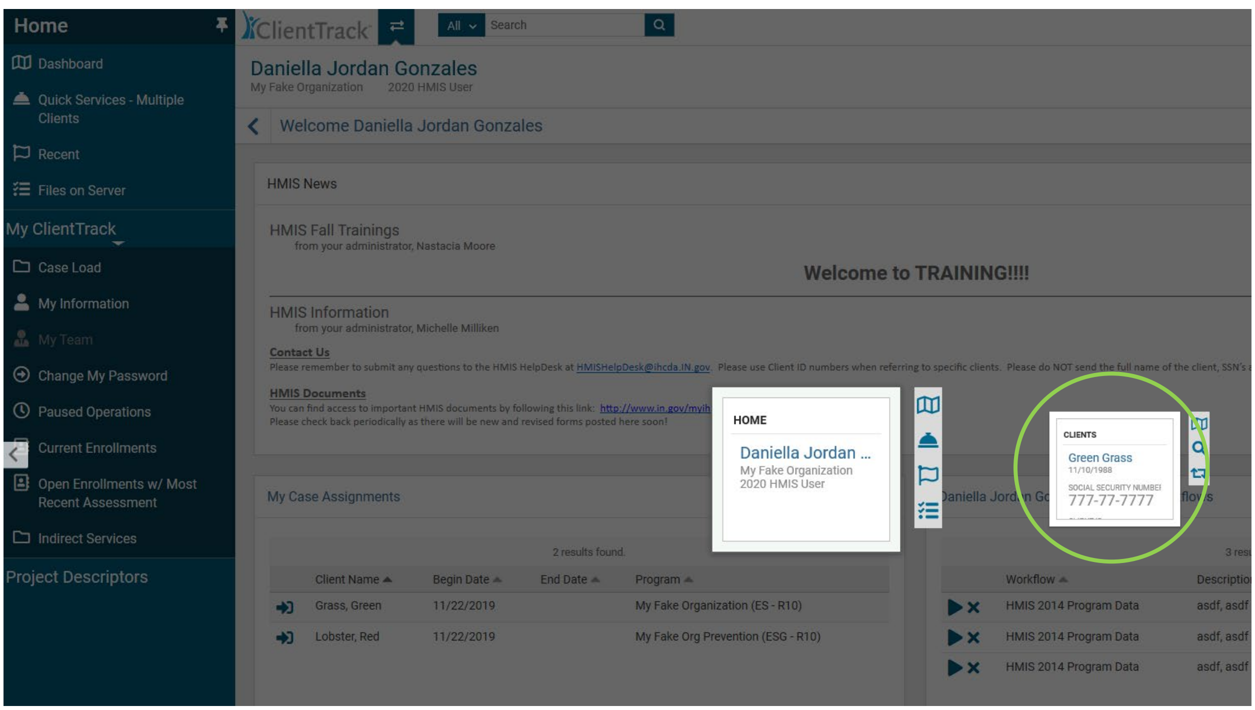
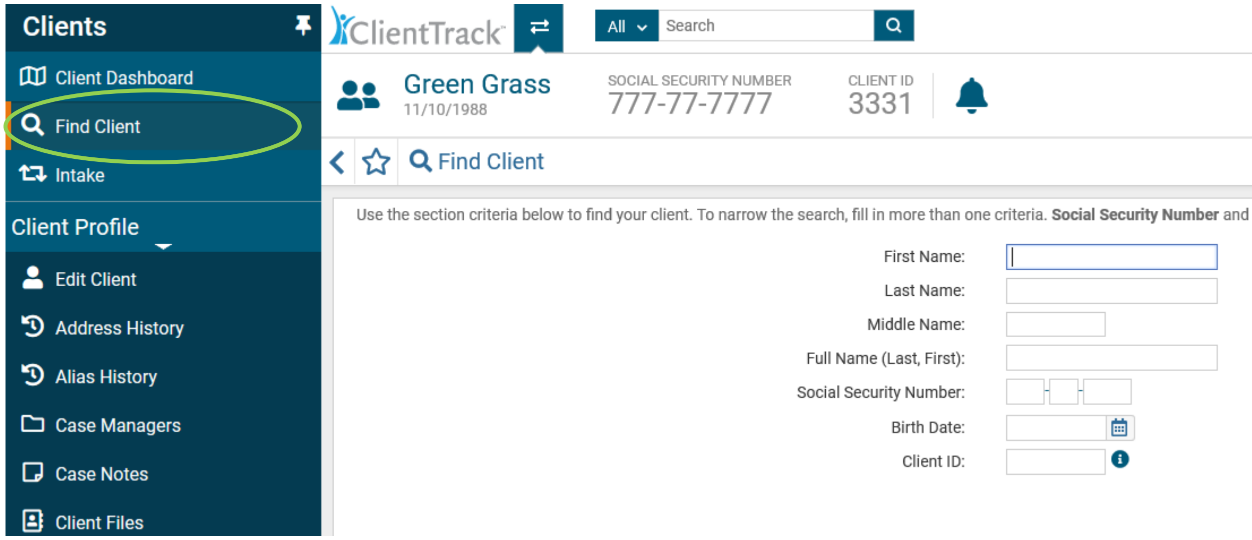
How to Upload Documents to HMIS

1. Log into ClienTrack and go to the “Clients” workspace by clicking on the two inverted arrows icon at the top of your screen as shown in the image below. Then select the “Clients” wokspace in the pop-up window.

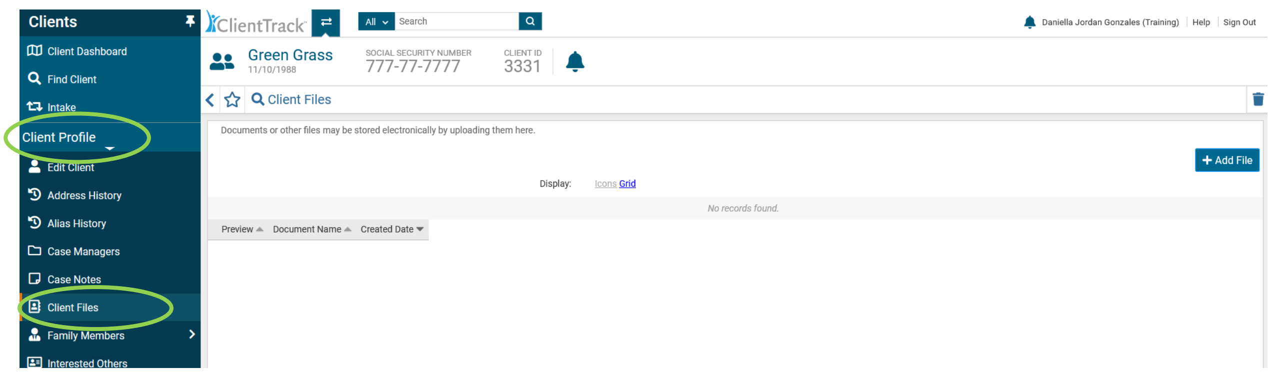




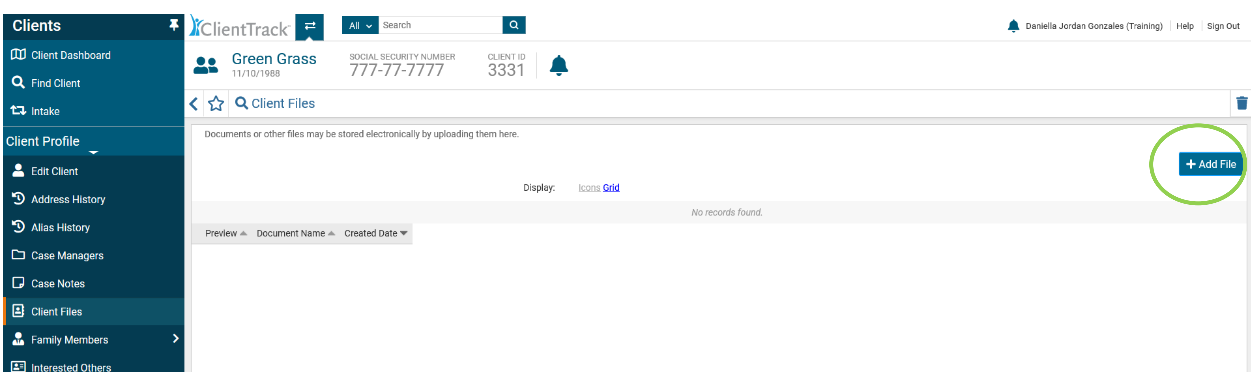
2. Click on “Find Client” as shown in the image below. In this case, I looked for Green Grass ID:3331.



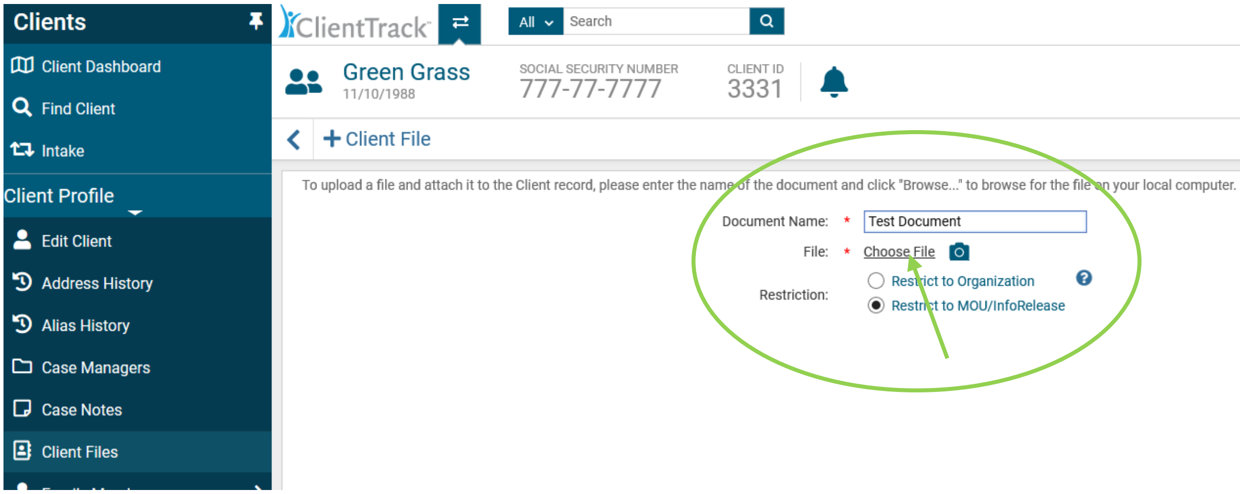
3. On the left-hand menu, click on “Client Profile” and then click on “Client Files” as shown in the image below.



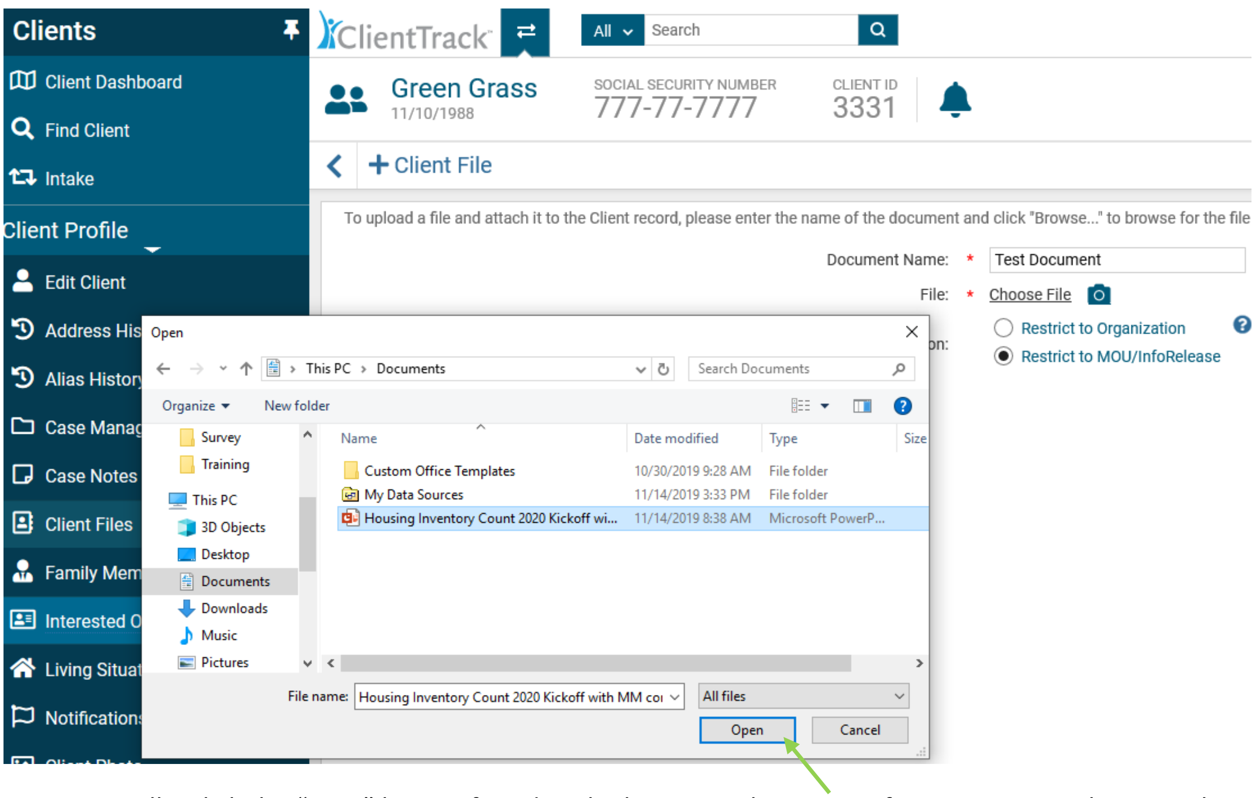
4. Click on the “+ Add File” button on the right side of your screen as shown in the image below.



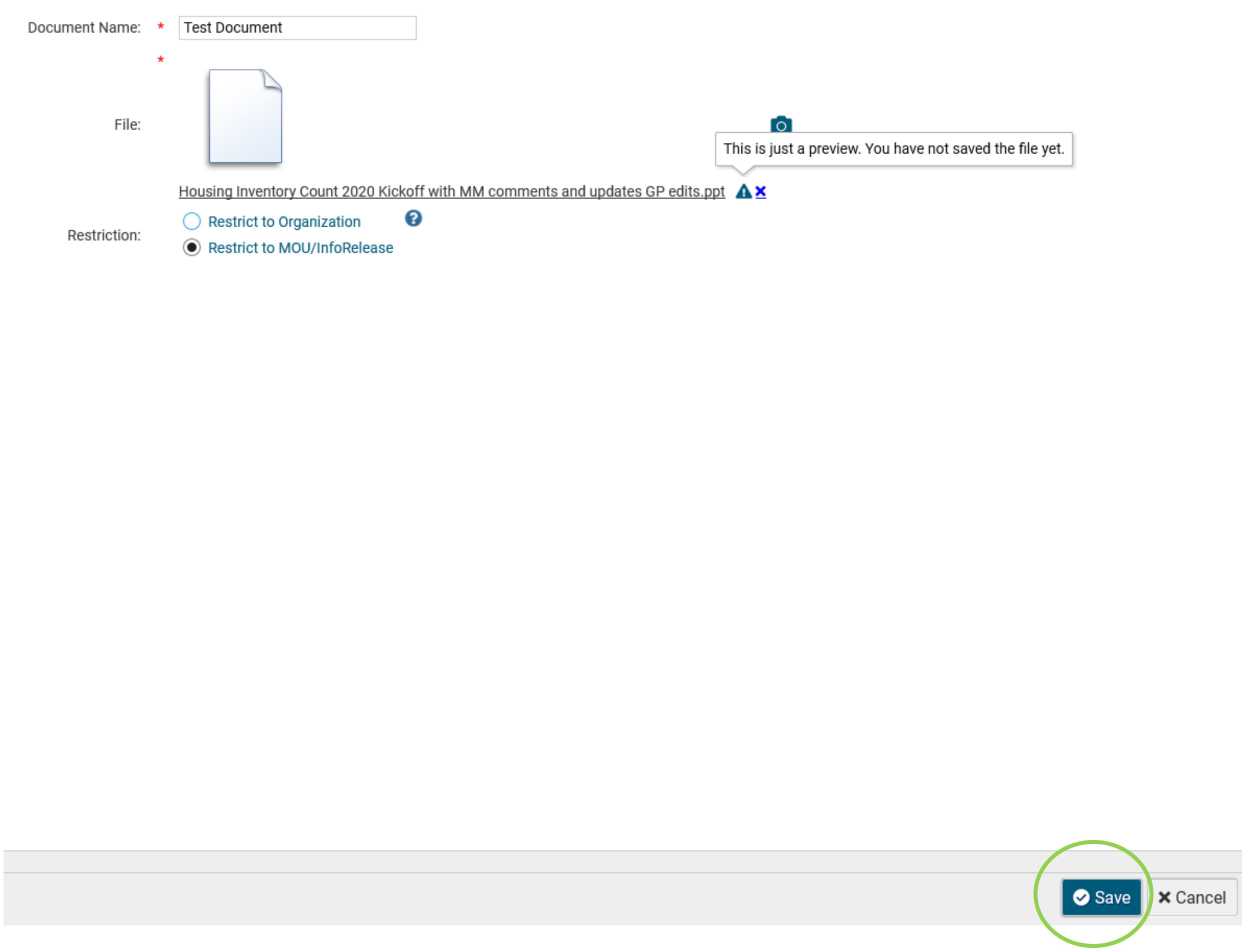
5. Type in the name of the document you want to upload in the “Document File” field. Choose the file you want to upload by clicking on the “Choose File” link, shown in the image below.



6. 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.



7. 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.


Document Name: *
Test Document
*
File:
This is just a preview. You have not saved the file yet.
Housing Inventory Count 2020 Kickoff with MM comments and updates GP edits.ppt
Restriction:
Restrict to Organization
Restrict to MOU/InfoRelease
Save
Cancel