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.

X	Q Search	Clients / ClientTrack Form			
*	 Client Dashboard Find Client 	Gummy Bear Social Security N 2/26/2000 312-98-04 Find Client	Iumber Client ID 178 1048318	4 🗎 🖸	
∎ ☆	 COVID-19 Intake ✓ COVID-19 Vaccine Intake 	your search.	First Name: Last Name:	gu be	
0	 Client Profile Common Client Assessments Other Assessments Client Enrollment and Client Services 		Middle Name: Full Name (Last, First): Social Security Number: Birth Date: Client ID:	MM/DD/YYYY 🛱	
		First Name Gummy	Last Name Mic	1 result found Idle Name SSN XXX-X	Birth Date x-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.

)x	Q Search	Clients / Client Dashboard
*	🖽 Client Dashboard	Gummy Bear Social Security Number Client ID 2/26/2000 312-98-0478 1048318
E	Q Find Client	Gummy Bear's Dashboard
2	17 Intake	Gummy Bear's Information
	COVID-19 Intake	
☆	COVID-19 Vaccine Intake	Name: Bear, Gummy Birth Date:
٥	🗸 🖸 Client Profile	Gender: Male
	Ledit Client	Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) Race:
	Address History	
	Alias History	
	Case Managers	Gummy's Enrollments
	Case Notes	
	Client Files	3 result
	> 🔒 Family Members	Enrollment Case Project Start Housing Move-
	Interested Others	Description Members Date

3. Click on the "+ Add File" button on the right side of your screen as shown in the image below.

)ř	Home Search	Clients / ClientTrack Form	DG 🗘 🛱
*	Client Dashboard Q Find Client	Gummy Bear Social Security Number Client ID 2/26/2000 312-98-0478 1048318 Client Files	< 0
법 슈	 COVID-19 Intake ✓ COVID-19 Vaccine Intake 	Documents or other files may be stored electronically by uploading them here.	+ Add File
	 Client Profile Edit Client Address History 	Display: Horio dra Document Category: SELECT V	
	 Alias History Case Managers Case Nates 	Preview Document Name Document Category Created Date 1	
	Client Files A granily Members		

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.

X	Q Search	Clients / ClientTrack Form / ClientTrack Form
-	Dient Dashboard	Gummy Bear Social Security Number Client ID 2/26/2000 312-98-0478 1048318 ↔ 🛱 🖸
8	Q Find Client	Client File
2	11 Intake	
	COVID-19 Intake	To upload a file and attach it to the Client record, please enter the name of the document and click "Browse"
ជ	COVID-19 Vaccine Intake	Document Category: General 🗸
٥		Document Name:* Test Document
	✓ ☐ Client Profile	File**
	Edit Client	Choose File
	Address History	
	Alias History	
	Case Managers	
	Case Notes	
	Client Files	

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.

)x	Q, Search	Clients / ClientTrack Form / ClientTrack Form	G 🗘 🛱
*	 Client Dashboard Find Client 	Gummy Bear Social Security Number Client ID 2/26/2000 312-98-0478 1048318 Client File	< 8
☆	 COVID-19 Intake ▲ COVID-19 Vaccine Intake 	To upload a file and attach it to the Client record, please enter the name of the document and click "Browse" to browse for the file on your local computer. Document Category: General V	
	 Client Profile Edit Client Address History Alias History Case Managers Case Notes Client Files 	Document Name:* Test Document	
0	 Family Members Interested Others Living Situation Notifications Client Photo 	© Spor	Cancel

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

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