



Files and Document Upload- HMIS Job Aid

This job aid will walk through how to upload documents, including vital documents and housing related documents, in the Files section of the client's HMIS record.

All files uploaded must be associated to the project the individual is enrolled in. **As of October 2023, uploaded files cannot be viewed by users outside of the organization/project that the file/s are associated to, even if multiple organizations are working with the same individual. Files are unique to each project enrollment.**

An individual must be enrolled in your project to upload files to their record; you must be able to associate the uploaded files to their enrollment in the project.

Files

The Files section is associated to the individual's client record in HMIS. To navigate to the Files section, you can search for your client using the client search functionality and select their client record:

Clients

Search Type

Broad Search Specific Search

Lucy Leek

Add New Client

To add a client, search first. Search Tips: Search by name, DOB (mm/dd/yyyy), SSN (xxx-yy-zzzz), Warehouse ID, Personal ID, or MCI ID. It is often most efficient to search using the first few characters of the first name and last name, e.g. to find Jane Smith you might search for ja sm.

Displaying 3 of 3 clients

MCI ID	HMIS ID	First Name	Last Name	SSN	DOB
1001140708	37	Lucy	Leek	Hidden	Hidden (34)
1001140778	157	Lucy	Lew	Hidden	Hidden (44)
1001140714	44	Lucille	Lemon	Hidden	Hidden (64)

Or, access your client by navigating to the *Enrollments* screen of your project and selecting their name. That will navigate you to their Enrollment Overview screen. From there, click the client's name in the top left side of the screen to navigate to their HMIS record.

Allegheny County HMIS - Training

My Dashboard Clients Projects Adm

Enrollment Close Lucy Leek > HSSC Training

Lucy Leek

Project HSSC Training

Project Type Services Only

Enrollment Period 09/17/2024 - Ongoing

Enrollment ID 389

Enrollment Overview

Household

Name	Relationship to HoH	Status
HoH Lucy Leek	Self (HoH)	Open
Lee Lettuce	Child	Open



Click the *Files* button on the left-hand side of the screen:

Allegheny County HMIS - Training My Dashboard

Client Close

Lucy Leek

Lucy Leek
Age: 34
she/her, they/them

Overview

Enrollments

Assessments

Services

Files

Case Notes

ADMIN

Audit History

Lucy Leek

No Client Photo

Pronouns she/her, they/them
DOB Hidden (34)
SSN Hidden

[Update Client Details](#)

Last Updated on 10/10/2024 11:07 AM by Training Provider.

Client IDs

Contact Information

Demographics

Race American Indian, Alaska Native, or Indigenous
Gender Woman
Pronouns she/her, they/them

Lucy Leek > Files

Files

[Upload File](#)

File Name	File Tags	Enrollment	Uploaded At
TEST DOCUMENT FOR DOCUMENT UPLOAD IN TRAINING.docx	Birth Certificate Monitoring Document	Emergency Shelter- Family 10/10/2024 - 10/10/2024	10/10/2024 11:05 AM by Training Provider

Click the *Upload File* button at the top right of the screen.

Lucy Leek > Files > Upload

Upload File

Onbase HCM Test Document.docx

Clear

File Tags (Required)

Chronic Homeless Verification Monitoring Document

Enrollment (Required)

HSSC Training (09/17/2024 - Active)

Access will be limited to users who can view this Enrollment.

[Upload File](#) [Discard](#)

At the top of the screen, click to upload or drag and drop the file you want to upload.



You must tag the file; this dropdown is a multiselect and has an array of options from identification, disability, housing/homeless, income, veteran, and other. Select as many tags as apply.

Select your project in the Enrollment dropdown to associate the document to the individual's enrollment and click the *Upload File* button to upload.

Once the file is uploaded, it will display in the Files section.

Lucy Leek > Files

Files Upload File

File Name	File Tags	Enrollment	Uploaded At
Onbase HCM Test Document.docx	Chronic Homeless Verification Monitoring Document	HSSC Training 09/17/2024 - Ongoing	10/31/2024 03:30 PM by Ann Boyd
TEST DOCUMENT FOR DOCUMENT UPLOAD IN TRAINING.docx	Birth Certificate Monitoring Document	Emergency Shelter-Family 10/10/2024 - 10/10/2024	10/10/2024 11:05 AM by Training Provider

To view, download, edit, or delete a file, click the file name and take action in the pop-up.

Onbase HCM Test Document.docx

Updated 51 seconds ago by Ann Boyd
Created 1 minute ago

Download Edit Delete

File Tags
Chronic Homeless Verification, Monitoring Document

Enrollment
HSSC Training (09/17/2024 - Active)

File Preview

No Preview Available
Please [download the file](#) to view

For more information...

For assistance, please contact the Allegheny County Service Desk at dhs-servicedesk@alleghenycounty.us or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.