Files and Document Upload- HMIS Job Aid

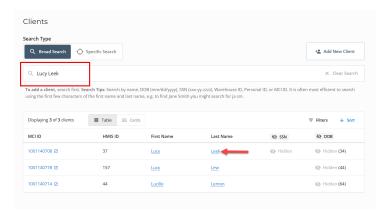
This job aid will walk through walk through how to upload documents, including vital documents and housing related documents, in the Files section of the client's HMIS record.

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.

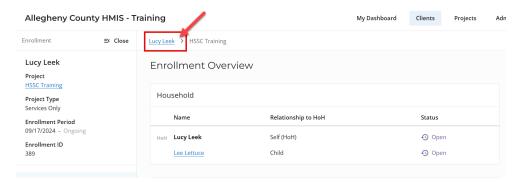
An individual must be enrolled in your project to upload files to their record; you must be able to associate the uploaded files to their enrollment in the project.

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:

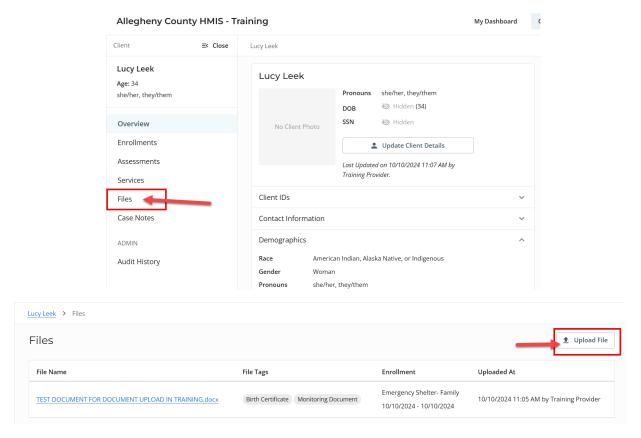


Or, access your client by navigating to the *Enrollments* screen of your project and selecting their name. That will navigate you to their Enrollment Overview screen. From there, click the client's name in the top left side of the screen to navigate to their HMIS record.

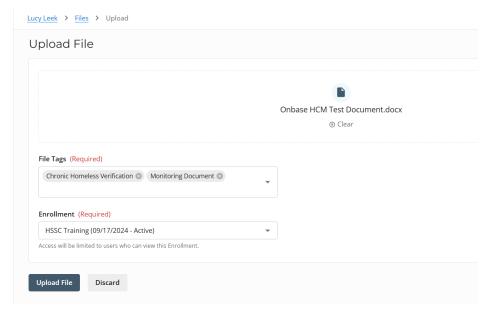




Click the Files button on the left-hand side of the screen:



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



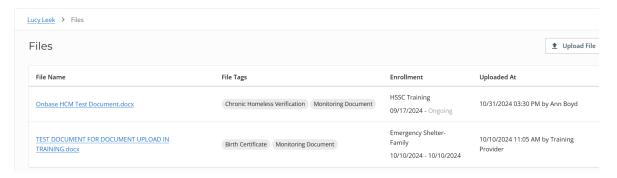
At the top of the screen, click to upload or drag and drop the file you want to upload.



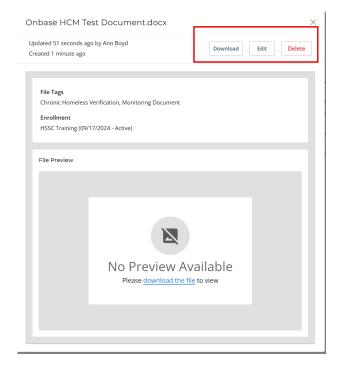
You must tag the file; this dropdown is a multiselect and has an array of options from identification, disability, housing/homeless, income, veteran, and other. Select as many tags as apply.

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.



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



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.