

How to Upload Doc Ready Documents onto Client Page in HMIS

Step 1: HMIS Homepage

1. Click Client Point on the HMIS Homepage to search for your client

The screenshot displays the WellSky Community Services interface for CAP Solano. The header includes the user name 'DeAndre Richard' (Agency Admin) and the date 'September 04, 2022'. The main dashboard is titled 'Home > Home Page Dashboard' and features a search bar and a 'Type here for Global Search' input. The dashboard is divided into three main sections: 'System News (3)', 'Agency News (0)', and 'Follow Up List (0)'. The 'System News' section contains three items with dates and headlines. The 'Follow Up List' section is currently empty. A 'Customize Home Page Dashboard' link is located at the bottom of the dashboard area. A 'Legal Notices' section is visible at the bottom left.

System News (3)

Date	Headline
01/01/2020	How to Request a Training Session
01/01/2020	How to Request Technical Assistance
01/01/2020	How to Reset Your Password

Agency News (0)

Follow Up List (0)

Client ID	Type	Date	Time Remaining
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[View All](#) [View All](#)

[Customize Home Page Dashboard](#)

Legal Notices

Step 2: Client Point Page

- On the client point page – Enter the first 3 letters of the first and last name in the name boxes
- Verify it is the correct client by DOB and last 4 #'s of SSN
- Once verified click on the client when they appear at the bottom under Client Results
- **HMIS # is the easiest way to pull up a client**
- **The More information you have the better (last 4 #'s of SSN etc.)**

WellSky Community Services | CAP Solano | Resource Connect Solano | September 04, 2022 | DeAndre Richard Agency Admin

ClientPoint > Client Search

Type here for Global Search

Client Search

Please Search the System before adding a New Client.

Name: First [Dre], Middle, Last [Ric], Suffix

Name Data Quality: -Select-

Alias:

Social Security Number: - - -

Social Security Number Data Quality: -Select-

U.S. Military Veteran?: -Select-

Exact Match:

Search Clear Add New Client With This Information

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # [] Submit

Client Search

Please Search the System before adding a New Client.

Name: First [Dre], Middle, Last [Ric], Suffix

Name Data Quality: -Select-

Alias:

Social Security Number: - - -

Social Security Number Data Quality: -Select-

U.S. Military Veteran?: -Select-

Exact Match:

Search Clear Add New Client With This Information

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # [] Submit

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
[Redacted]	[Redacted]	[Redacted]6743	[Redacted]		[Redacted]		0
[Redacted]	[Redacted]		01/01/2000		[Redacted]		0

Showing 1-2 of 2



CAP Solano

Resource Connect Solano

September 04, 2022

Mode: Shadow
 Enter Data As
 Back Date

ClientPoint > Client Search

Type here for Global Search



▶ Last Viewed Favorites

- Home
- ClientPoint
- ResourcePoint
- SkansPoint
- ▶ Reports
- ▶ Admin
- Logout

Client Search

Please Search the System before adding a New Client.

Name	First <input type="text" value=""/>	Middle <input type="text" value=""/>	Last <input type="text" value=""/>	Suffix <input type="text" value=""/>
Name Data Quality	-Select-			
Alias	<input type="text" value=""/>			
Social Security Number	<input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/>			
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

- ▶ Last Viewed
- Favorites
- Home
- ClientPoint
- ResourcePoint
- SkandPoint
- ▶ Reports
- ▶ Admin
- Logout

Client Search

 Please Search the System before adding a New Client.

Name	First Dre	Middle	Last Ric	Suffix
Name Data Quality	-Select-			
Alias				
Social Security Number				
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

Client Results

	ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
			 -6743					0 
				01/01/2000				0 

Showing 1-2 of 2

Step 3: Client Information Page

Client - [REDACTED]

Release of Information: **Expired**

Client Information | Service Transactions

Summary | **Client Profile** | Households | ROI | Entry / Exit | Case Managers | Case Plans | Assessments

Client Record Issue ID Card

Name	[REDACTED]
Name Data Quality	Full Name Reported
Alias	
Social Security	[REDACTED]
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	22

Client Demographics

Date of birth	03/16/2000
Date of birth type	Full DOB Reported (HUD)
Gender	Female
Primary race	Black, African American, or African (HUD)
Secondary race	Black, African American, or African (HUD)
Ethnicity	Non-Hispanic/Non-Latin(a)(o)(x) (HUD)

Change Clear

Exit

Client Profile Assessment

When you click the clients name the Clients Information page will come up

There are several tabs under the client information page.

The tab that we want is the Client Profile tab – click that

Step 4: Getting to File Attachments

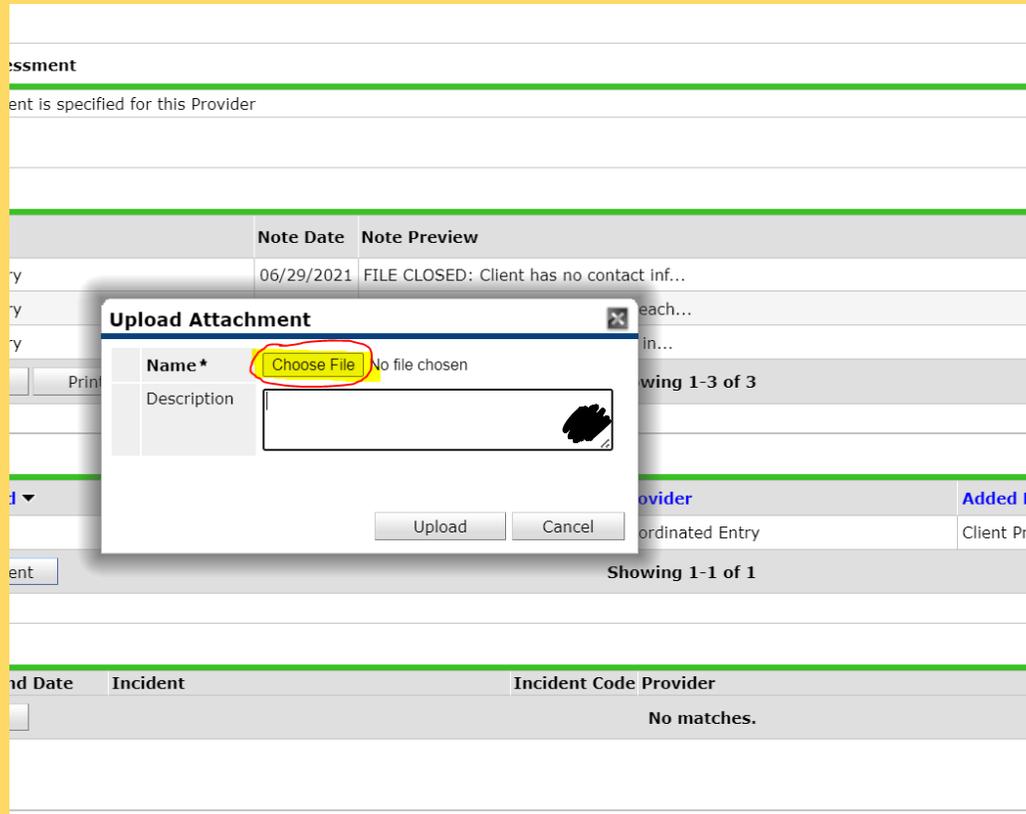
The screenshot displays a web interface for a client profile. It is divided into several sections: Client Profile Assessment, Client Notes, File Attachments, and Incidents. The File Attachments section is the focus, showing a table with one entry and a highlighted 'Add New File Attachment' button.

Provider	Note Date	Note Preview	Full Note
Coordinated Entry	06/29/2021	FILE CLOSED: Client has no contact inf...	
Coordinated Entry	04/10/2020	1st ATTEMPT - There is no way to reach...	
Coordinated Entry	11/05/2018	INITIAL NOTES: Client is homeless in...	

Date Added	Name	Description	Type	Provider	Added From
12/03/2018		ROI	pdf	Coordinated Entry	Client Profile

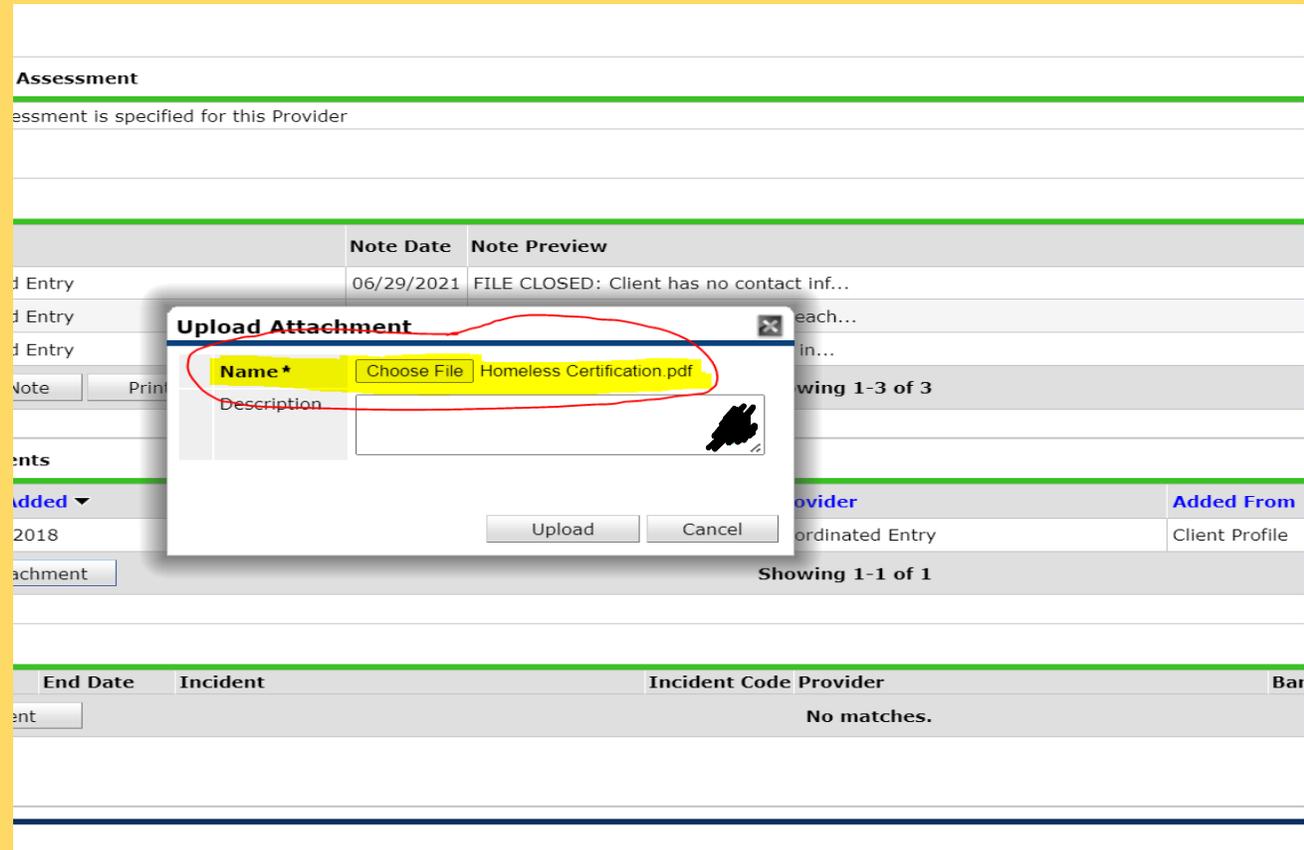
- Once on the client profile tab scroll down to File Attachments
- Select Add New File Attachment

Step 5.1: Selecting File



- Once you have saved the document that you would like to upload on *your computer* and have named it under the correct naming convention select **Choose File**
- Choose the Document on your computer that you would like to upload

Step 5.2: Selecting File



- When you choose the document then it will appear next to choose file and will have the file name that it was saved under **(remember to use the correct naming convention or your document will be deleted)**
- Once you see the document name appear click **upload**

Step 6: Complete - File Uploaded

The file will now be uploaded and now show on the Clients page

Client Profile Assessment

No Client Profile Assessment is specified for this Provider

Client Notes

Provider	Note Date	Note Preview	Full Note
Coordinated Entry	06/29/2021	FILE CLOSED: Client has no contact inf...	
Coordinated Entry	04/10/2020	1st ATTEMPT - There is no way to reach...	
Coordinated Entry	11/05/2018	INITIAL NOTES: Client is homeless in...	

Showing 1-3 of 3

File Attachments

Date Added	Name	Description	Type	Provider	Added From
09/04/2022	Homeless Certification.pdf		pdf	Resource Connect Solano	Client Profile
12/03/2018	XXXXXXXXXX	ROI	pdf	Coordinated Entry	Client Profile

Showing 1-2 of 2

Incidents

Start Date	End Date	Incident	Incident Code	Provider	Ban Site	Staff
No matches.						

Exit

Before

Client Profile Assessment
No Client Profile Assessment is specified for this Provider

Client Notes

Provider	Note Date	Note Preview	Full Note
Coordinated Entry	06/29/2021	FILE CLOSED: Client has no contact inf...	
Coordinated Entry	04/10/2020	1st ATTEMPT - There is no way to reach...	
Coordinated Entry	11/05/2018	INITIAL NOTES: Client is homeless in...	

Add New Client Note Print Showing 1-3 of 3

File Attachments

Date Added	Name	Description	Type	Provider	Added From
12/03/2018	[REDACTED]	ROI	pdf	Coordinated Entry	Client Profile

Add New File Attachment Showing 1-1 of 1

Incidents

Start Date	End Date	Incident	Incident Code	Provider	Ban Site	Staff
No matches.						

Add New Incident Showing 0-0 of 0

Exit

After

Client Profile Assessment
No Client Profile Assessment is specified for this Provider

Client Notes

Provider	Note Date	Note Preview	Full Note
Coordinated Entry	06/29/2021	FILE CLOSED: Client has no contact inf...	
Coordinated Entry	04/10/2020	1st ATTEMPT - There is no way to reach...	
Coordinated Entry	11/05/2018	INITIAL NOTES: Client is homeless in...	

Add New Client Note Print Showing 1-3 of 3

File Attachments

Date Added	Name	Description	Type	Provider	Added From
09/04/2022	Homeless Certification.pdf		pdf	Resource Connect Solano	Client Profile
12/03/2018	[REDACTED]	ROI	pdf	Coordinated Entry	Client Profile

Add New File Attachment Showing 1-2 of 2

Incidents

Start Date	End Date	Incident	Incident Code	Provider	Ban Site	Staff
No matches.						

Add New Incident Showing 0-0 of 0

Exit