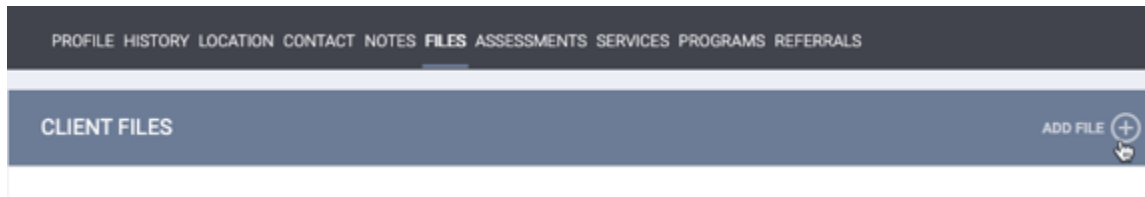


Uploading New Files to Clarity HMIS

To upload a new file:

- Click ADD FILE.



- Select the most appropriate **Category** and **Name** for the file. Turn on the **Private** toggle if you do not want the uploaded file to be shared with staff members at other agencies, regardless of your agency's sharing settings (for more information, refer to [Making Client Data Private](#)).
- Click *Select File* to upload the file from your computer or device. If you're unable to upload the file by clicking *Select File*, you can use the Basic Uploader.

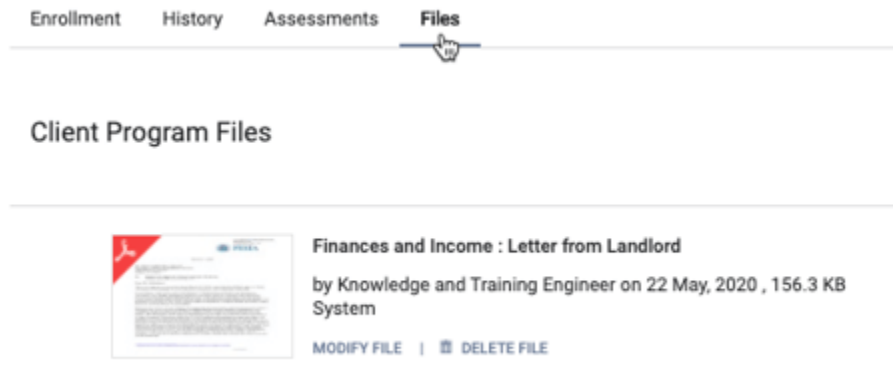
Note: Files uploaded to a client record from the client-level FILES tab will not be associated with a program enrollment unless linked to (described below).

Program Files

Accessing Program Files

To view, edit, upload, delete, or link files within an enrollment:

- [Create a new enrollment](#) or [navigate to an existing program enrollment](#) within the client record.
- Within the enrollment, navigate to the *Files* tab.



Note: You can only upload and link files for an enrollment to a program within your agency or the agency you're switched into.

From the program enrollment *Files* tab, you can either add a new file or link a previously uploaded file from the client-level FILES tab.

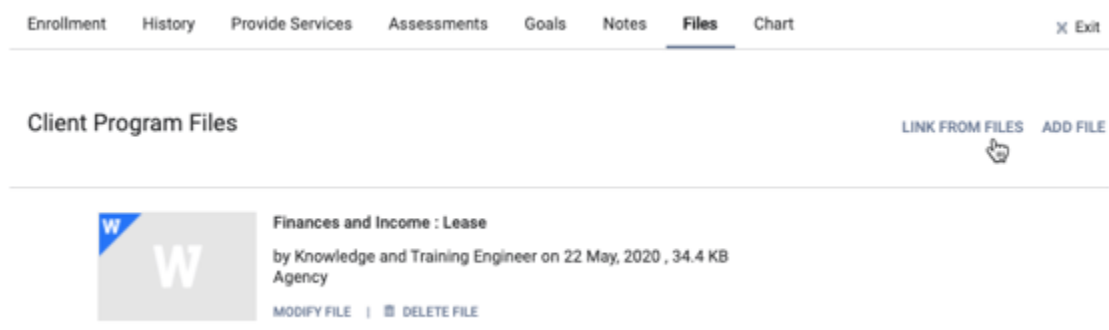
Linking Files to an Enrollment

Linking a client-level file to an enrollment displays the file within the program enrollment *Files* tab and allows the file to be reportable as linked to the enrollment.

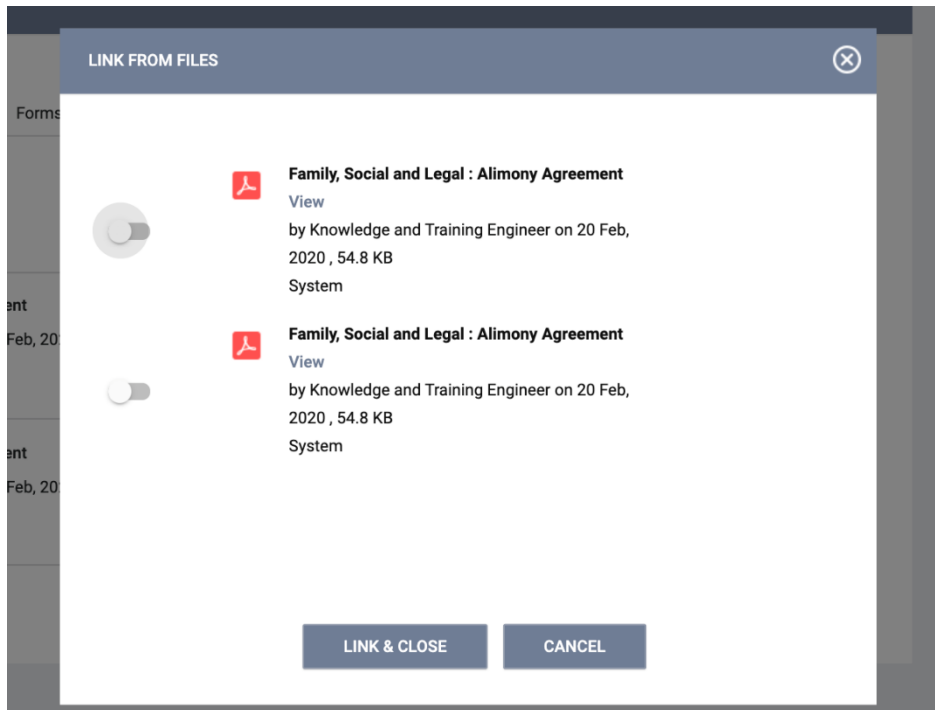
Note: Client-level files can be linked to multiple enrollments.

To link a file to an enrollment:

- Click *LINK FROM FILES*.



- Select one or more files previously uploaded from the client-level FILES tab and click *LINK & CLOSE*.



Note: To link to a file uploaded by a staff member at another agency, that agency's **Files** sharing setting must be "Basic Shared" or "Full Shared."

A file uploaded within (or linked to) an enrollment is listed in the client-level FILES tab with an  icon that, when you hover over it, shows the programs to which the file is linked



Note: When a staff member deletes a file linked to an enrollment from the client-level FILES tab, it's also deleted from the enrollment and vice versa.