File Attachments in ServicePoint
HMIS Learning Center

This document provides guidance for adding file attachments in ServicePoint and creating a standard naming convention.

Contents

A. File Attachment Naming Convention 1
B. Adding a File Attachment to ServicePoint 2

A. File Attachment Naming Convention

The naming convention for files uploaded to ServicePoint should include the **Name of Document, Date,** and **Name of Client**. File names need to be added prior to the document being uploaded. Specific instructions are displayed in the table below.

Name of Document	Date	Name of Client
ID2018_1_16jsmith ↑ Ex: Client's identification.	ID**2018_1_16**jsmith ↑ Year, month, day (Ex. January 16, 2018). See below for which date to use.	ID2018_1_16**jsmith** ↑ First initial, last name of client.

Example of Naming Conventions

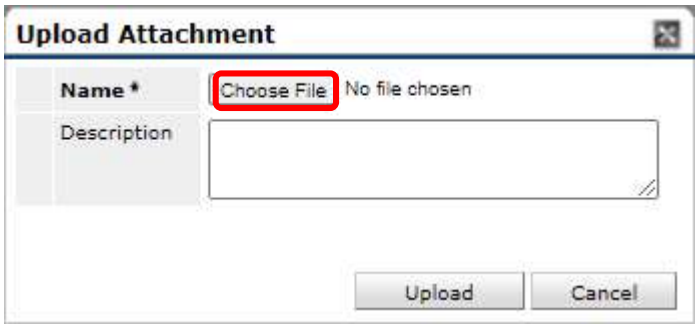
Document	Naming Convention	Date Details
Identification	ID2018_1_16jsmith	Date the ID was collected.
Birth Records (Children's birth records should be attached to the Head of Household's HMIS client record.)	BR2018_1_16marysmith	Date the birth record was collected; you may want to include the full first name for the child.
Proof of Income	Income2018_1_7jsmith	Date on pay stub.
Verification of Chronicity	VOC2018_1_16jsmith	Date the VOC was signed.
Verification of Homelessness	VOH2018_1_16jsmith	Date the VOH was signed.
Verification of Disability	VOD2018_1_8jsmith	Date the VOD was signed.

B. Adding a File Attachment to ServicePoint

Users should be mindful of which documents are added to a client's profile in HMIS. Documents should only be uploaded on a need-to-know basis.

1. Navigate to the **Client Profile Tab**.
2. Scroll to the **File Attachments** section and click on the **Add New File Attachments** button.

3. Click **Choose File** to find the document.



4. Select the file and add a description.
5. Click **Upload**.

If you have any questions about the material covered in this workflow, please contact the MCAH help desk at mihelp@mihomeless.org (MI) or nchelp@nchmis.org (NC).