

Document Check: Folder

The “Document Check” folder stores client files. Document check files are stored in a client’s individual profile. “Document Check” allows for detailed information to be captured about the type of documentation uploaded to the client record. As of the publishing of this user manual, “Document Check” is the standard for uploading documents instead of the Client Files: Folder option.

Accessing “Document Check” – Method #1 (of 2)

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”***

** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Document Check” secondary sidebar* menu option. ClientTrack will navigate to the “Document Check History” workspace container.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

Lebron James 4/4/1994 624 904-555-8458

Document Check History

The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record.

+ Add New Document Check Quick Document Check Multi File Download

19 results found.

Verified Item	Accepted Document	Comments	Verification Date	Download File
Housing Status	Letter		07/25/2024	<input type="checkbox"/>
Housing Status	Letter		07/11/2024	<input type="checkbox"/>
Citizenship	Birth Certificate		05/01/2024	<input type="checkbox"/>
Identity	Driver's License		04/11/2024	<input type="checkbox"/>
Household Income	W-2		03/13/2024	<input type="checkbox"/>
Employment Eligibility	Birth Certificate		03/13/2024	<input type="checkbox"/>
Utility Assistance Need	Past Due Utility Bill		03/13/2024	<input type="checkbox"/>
Eligibility	Income		03/13/2024	<input type="checkbox"/>
Housing Status	Rental Contract		03/13/2024	<input type="checkbox"/>
Housing Status	Rental Contract		12/12/2023	<input type="checkbox"/>
Employment Eligibility	Birth Certificate		11/09/2023	<input type="checkbox"/>
Referral Packet	Referral Packet		11/03/2023	<input type="checkbox"/>

Get CCD Cancel

Document Check

Accessing “Document Check” – Edit Client Menu Option – Method #2 (of 2)

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”***

** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Edit Client” secondary sidebar* dropdown menu option. ClientTrack will navigate to the “Client Information” workspace container, and a dropdown menu will appear under the “Edit Client” folder.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

Step 3: Select the “Document Check” secondary sidebar menu option. ClientTrack will navigate to the “Document Check History” page.

Search

- Find Client
- HMIS Intake
- Client Files
- Document Check**
- Client Dashboard
- ▼ Edit Client
 - Address History
 - Client Photo
 - Interested Others
 - Case Managers
 - Notifications
 - Alias History
 - Document Check**
 - Client Files
 - ID Card
 - Case Notes
 - Assessments
 - Referrals
 - Services
 - Enrollments
 - Family Members
 - HMIS 2017 Veteran Information

Clients / Document Check History

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624
4/4/1994
904-555-8458

Document Check History

The client's history of document checks displays below. To check documents for the client, click **Add New Document Check** or **Quick Document Check**. To edit or view an existing document check record, click **Edit Document Check** next to the record.

+ Add New Document Check
Quick Document Check
Multi File Download

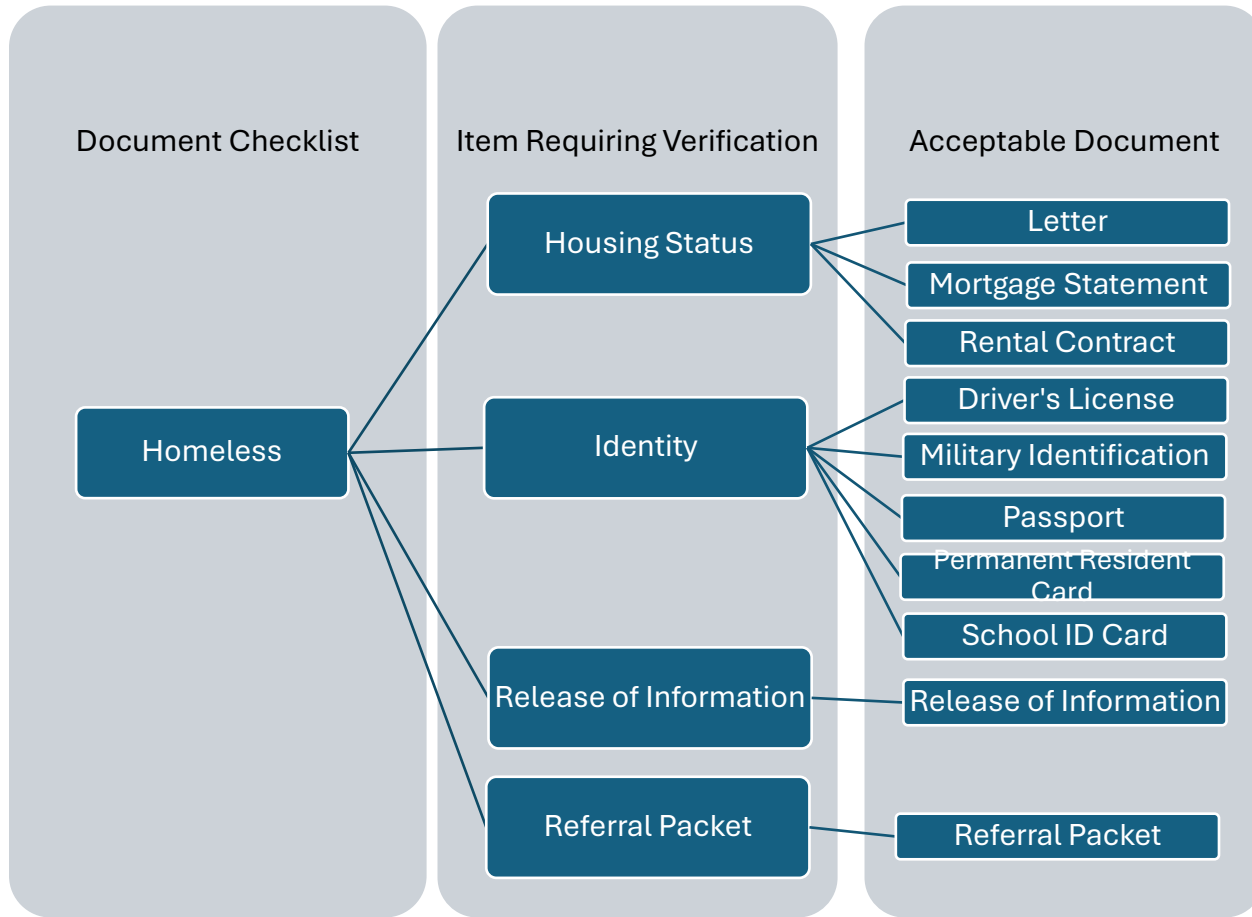
19 results found.

Verified Item	Accepted Document	Comments	Verification Date	Download File
*** Housing Status	Letter		07/25/2024	<input type="checkbox"/>
*** Housing Status	Letter		07/11/2024	<input type="checkbox"/>
*** Citizenship	Birth Certificate		05/01/2024	<input type="checkbox"/>
*** Identity	Driver's License		04/11/2024	<input type="checkbox"/>
*** Household Income	W-2		03/13/2024	<input type="checkbox"/>
*** Employment Eligibility	Birth Certificate		03/13/2024	<input type="checkbox"/>
*** Utility Assistance Need	Past Due Utility Bill		03/13/2024	<input type="checkbox"/>
*** Eligibility	Income		03/13/2024	<input type="checkbox"/>
*** Housing Status	Rental Contract		03/13/2024	<input type="checkbox"/>
*** Housing Status	Rental Contract		12/12/2023	<input type="checkbox"/>
*** Employment Eligibility	Birth Certificate		11/09/2023	<input type="checkbox"/>
*** Referral Packet	Referral Packet		11/03/2023	<input type="checkbox"/>

Get CCD Cancel

Document Check via Edit Client Folder

Document Check – File Categorization Methodology in “Document Check”



File Categorization Methodology