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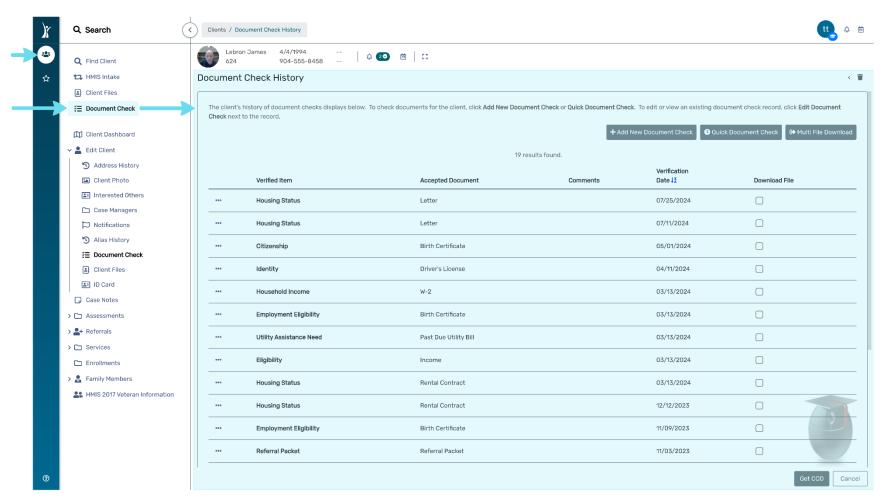
For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".

** *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".

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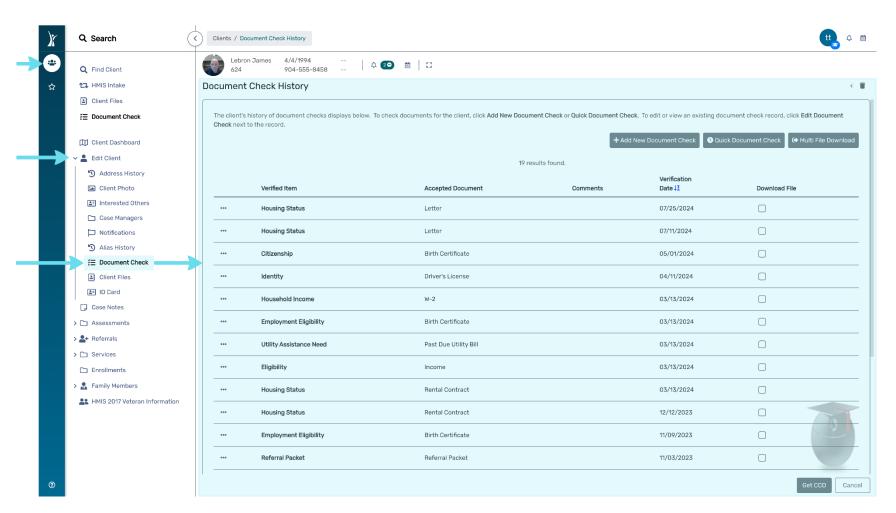
** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".

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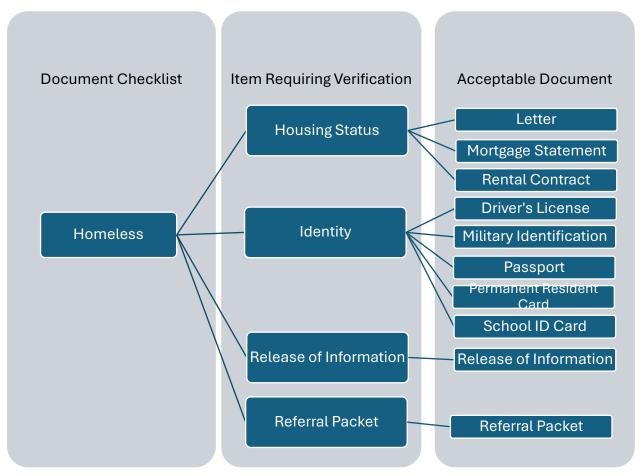
*For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the "HMIS Basic User 2025 Manual".

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

Document Check via Edit Client Folder

Document Check – File Categorization Methodology in "Document Check"

Document Checklist	Item Requiring Verification	Acceptable Document
Homeless	Housing Status	Letter
		Mortgage Statement
		Rental Contract
	Identity	Driver's License
		Military Identification
		Passport
		Permanent Resident Card
		School ID Card
	Release of Information	Release of Information
	Referral Packet	Referral Packet

File Categorization Methodology