

Adding Individual Documentation in “Document Check”

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”.*

Step 3: Click “Add New Document Check” button.

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Clients / Document Check History
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Search

Find Client

HMIS Intake

Client Files

Document Check

Client Dashboard

Edit Client

Case Notes

Assessments

Referrals

Services

Enrollments

Family Members

HMIS 2017 Veteran Information

Lebron James 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

18 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"/>
***	Household Income	W-2		03/13/2024	<input type="checkbox"/>
***	Employment Eligibility	Birth Certificate		03/13/2024	<input type="checkbox"/>

Step 4: This will bring you to the “Document Check”* form where supplemental information is added regarding the documentation you are uploading. Check with your supervisor on your program’s requirements. Required elements are marked with a (*).

Search

Clients / Document Check History / Document Check

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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

Lebron James
624

4/4/1994

904-555-8458

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Document Check

Select a **Document Checklist** to filter selections for **Verification Items**. Select **Acceptable Document and Storage**. Enter any additional **Comments**. Complete **Verification Date** and enter optional **Issuance Date** and **Expiration Date** if applicable.

Document Checklist:^{*}

-- SELECT -- ▾

Item Requiring Verification:^{*}

-- SELECT -- ▾

Acceptable Document:^{*}

-- SELECT -- ▾

Storage:^{*}

-- SELECT -- ▾

Comments:

Verification Date:^{*}

08/16/2024 📅

Issuance Date:

MM/DD/YYYY 📅

Expiration Date:

MM/DD/YYYY 📅

Upload File:

Choose File 🖼️

Step 5: Next, select the “Verification Date” by either typing the date in MMDDYYYY format or by clicking on the calendar and clicking on the date you wish to select.

Document Check



Select a **Document Checklist** to filter selections for **Verification Items**. Select **Acceptable Document** and **Storage**. Enter any additional **Comments**. Complete **Verification Date** and enter optional **Issuance Date** and **Expiration Date** if applicable.

Document Checklist: * -- SELECT --

Item Requiring Verification: * -- SELECT --

Acceptable Document: * -- SELECT --

Storage: -- SELECT --

Comments:

Verification Date: * 08/22/2024

Issuance Date: MM/DD/YYYY

Expiration Date: MM/DD/YYYY

Upload File: Choose File

? August, 2024 x

<< < Today > >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Select date

Document Check Form Verification Date

Step 6: Click on the “Choose File” link to upload the file from your computer to the client’s record.

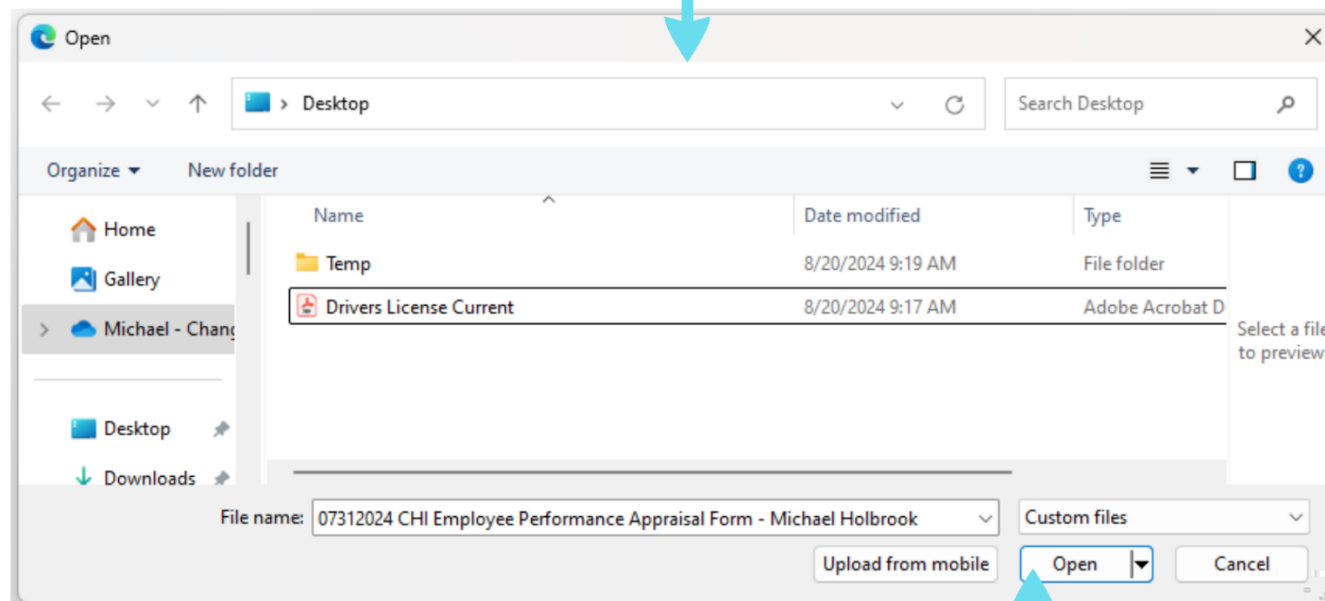
Issuance Date:

Expiration Date:

Upload File:

Capture a photo using device camera

Clicking on "Choose File" allows the user to select a local computer file for upload



After attaching the file, click **Save** to complete the process.


Click open attach the appropriate document.

Choosing a File in "Document Check"

Step 7: When completed, click “Save”. ClientTrack will navigate to the “Document Check History” workspace container.

Document Check

Select a **Document Checklist** to filter selections for **Verification Items**. Select **Acceptable Document** and **Storage**. Enter any additional **Comments**. Complete **Verification Date** and enter optional **Issuance Date** and **Expiration Date** if applicable.

Document Checklist: *	Employer	▼
Item Requiring Verification: *	Identity	▼
Acceptable Document: *	Driver's License	▼
Storage:	-- SELECT --	▼
Comments:	<div></div>	
Verification Date: *	08/20/2024	📅
Issuance Date:	MM/DD/YYYY	📅
Expiration Date:	MM/DD/YYYY	📅
Upload File:	<div></div> <div>Drivers License Current.pdf ⚠️ ✕ 📷</div>	

✓ Save

Cancel

Save Document in “Document Check”