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”.

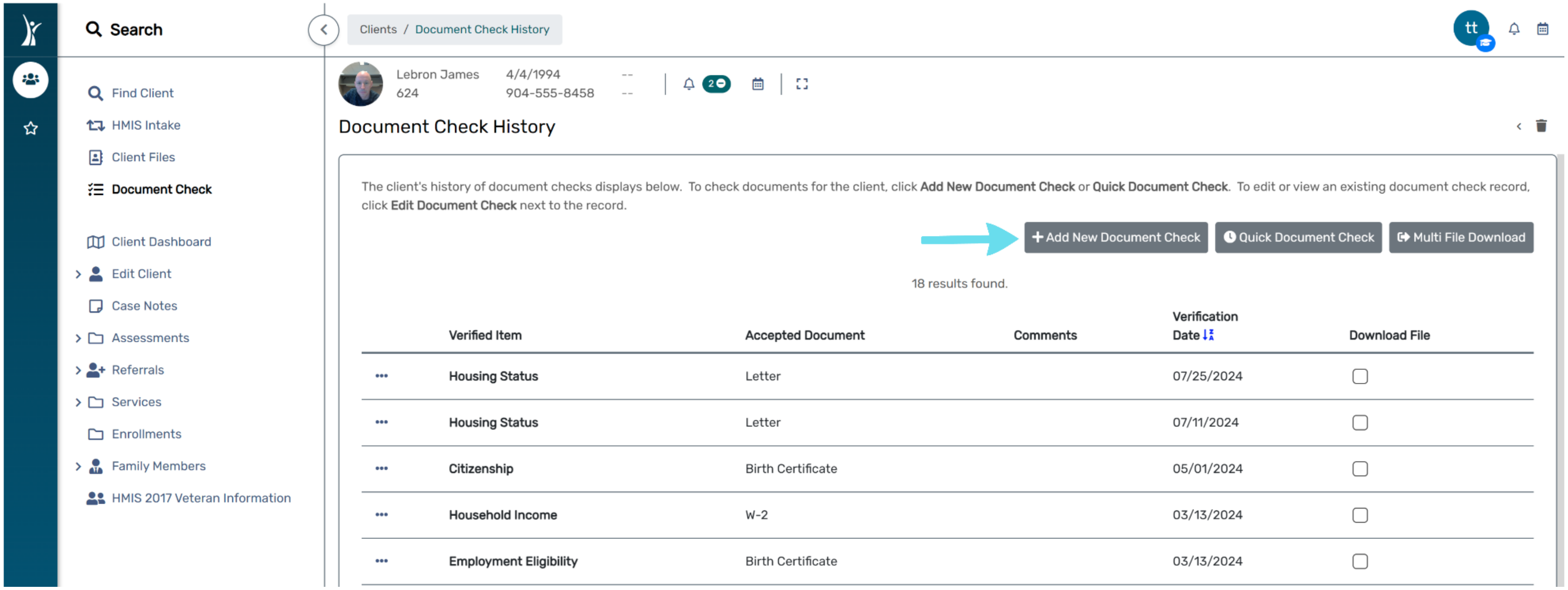
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using “Find Client” *in the* “HMIS Basic User 2025 Manual”.

**** 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”.

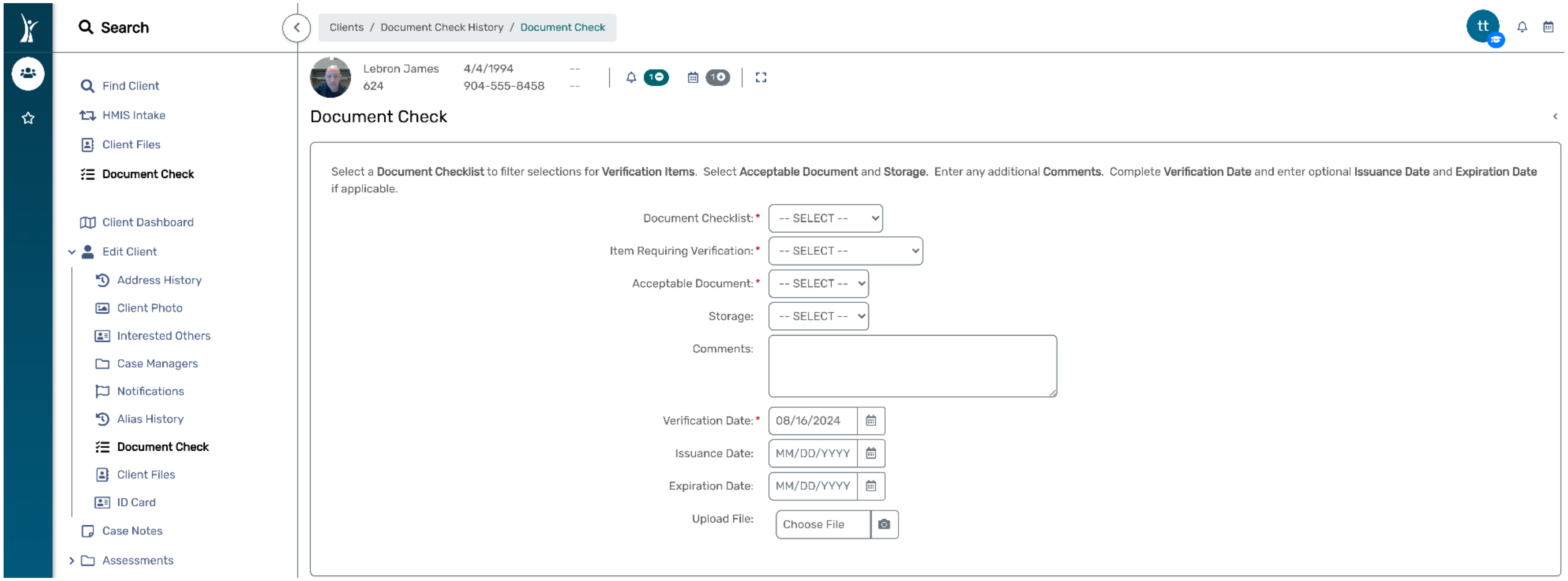
Step 3: Click “Add New Document Check” button.



Adding a Document to "Document Check"

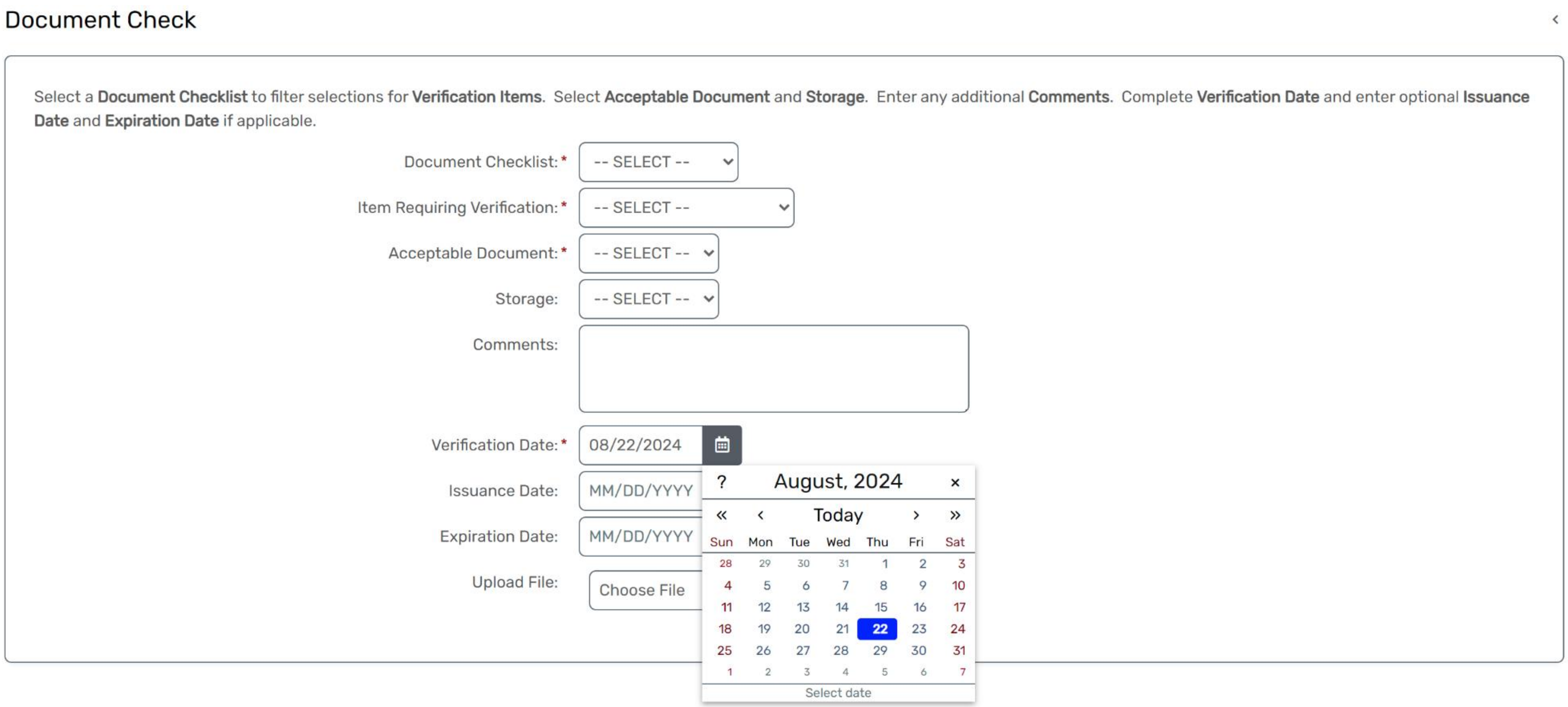
Step 4: This will bring you to the "Document Check"* form where supplemental information is added regarding the documentation you are uploading. Check with your supervisor on your program's requirements. Required elements are marked with a (*).

**For Document Check general file categoration, see Chapter 4: Client Workspace: Menu Optoins, Folders, and Subfolder/Document Check: Folder/*Document Check – File Categorization Methodology.



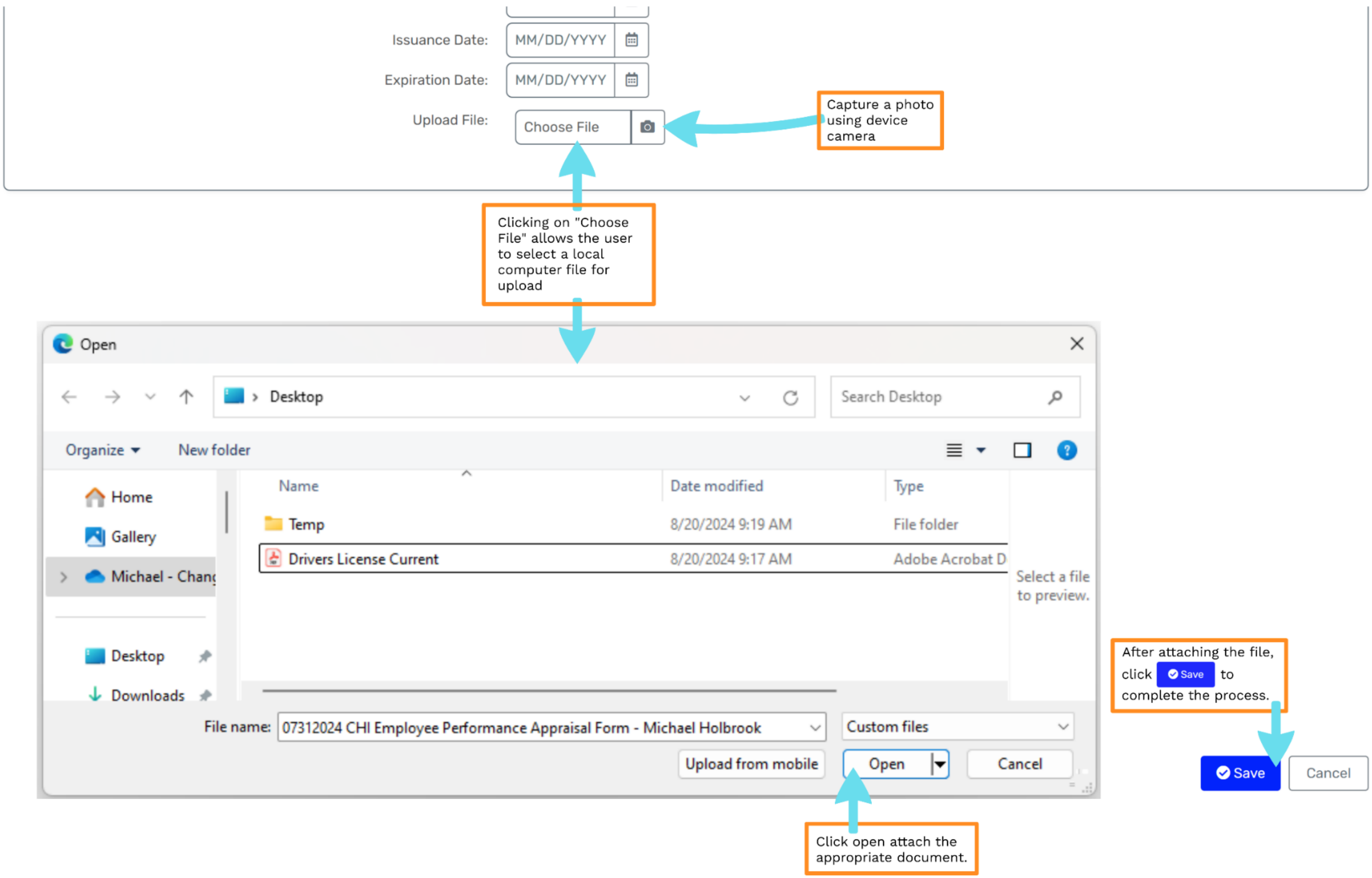
Document Check Form

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.



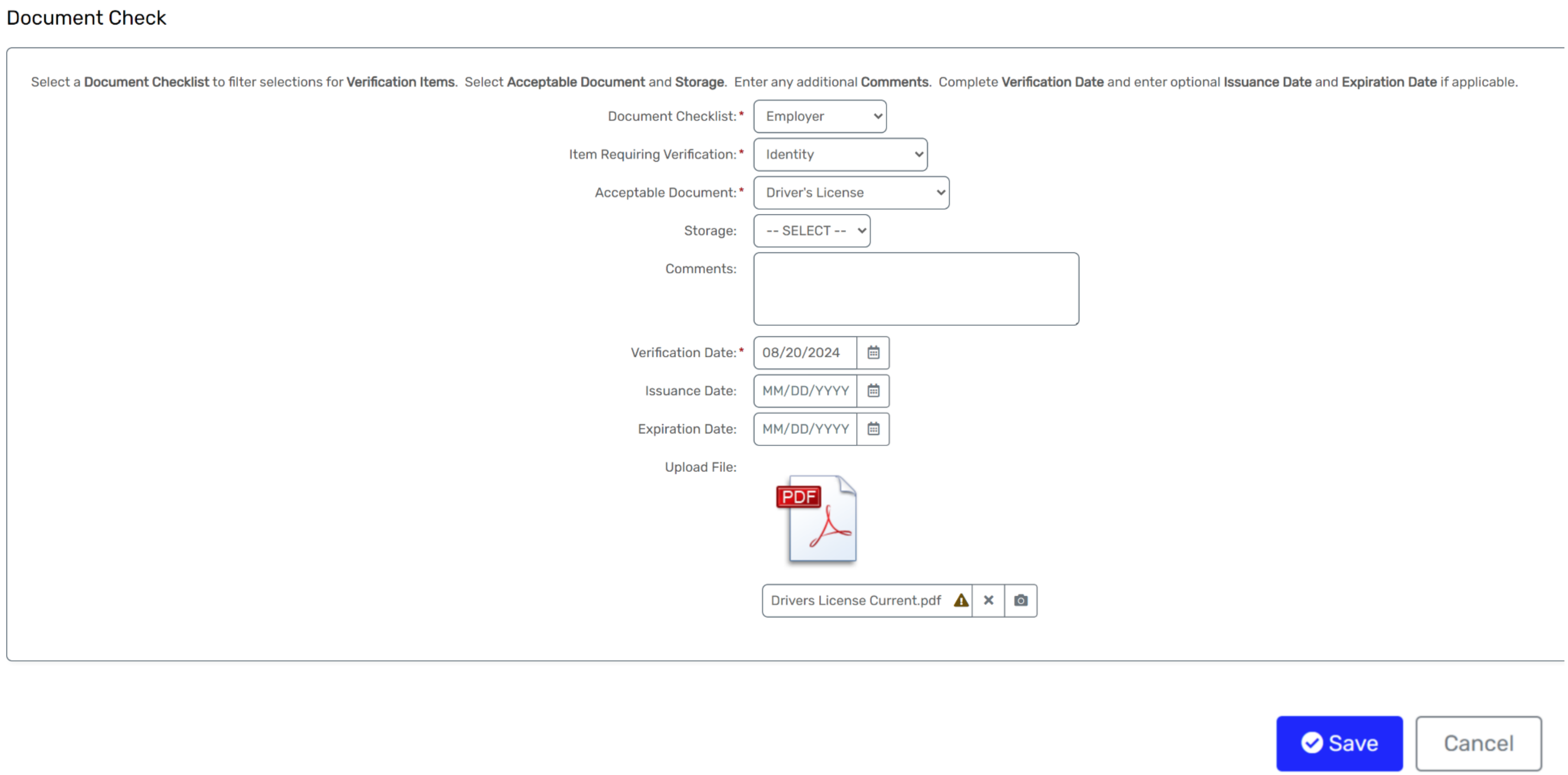
Document Check Form Verification Date

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



Choosing a File in "Document Check"

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



Save Document in “Document Check“