Adding Multiple Documents Using Quick Document Check

You can add multiple documents into "Document Check" at the same time using Quick 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 the "Quick Document Check" button.

Quick Document Check

Step 4: ClientTrack will navigate to the "Quick Document Check" form where multiple documents may be uploaded simultaneously. Required elements are marked with a (*).

Step 5: Add supplemental information regarding the documentation you are uploading. The form provides a blank "template" row for each "Verification Item".

Tips and Tricks - *When to use Quick Document Check vs Document Check*

- The Quick Document Check feature only works if you are uploading them all using the same "Verification Date" and the same "Document Checklist" category.
- Quick Document check only allows one file from a verification item to be uploaded. If later, you need to upload another document within the same verification item, you must use Document Check.

Tips and Tricks – Quick Document Check vs. Document Check

Select Document Checklist item.

Today's date will automatically be populated. backdating is possible by manually entering/selecting a date.

Quick Document Check Form

Step 6: Add documents as applicable to one or more rows. At least one file must be uploaded for each checked row. Click on the "Choose file" and choose a file from a locally stored document.

Quick Document Check

Select a **Document Checklist** to see verification items necessary for that list. Then select the acceptable documents that have been verified for the client along with the storage and document type you have obtained.

Verification Date:* `08/20/2024` 📅

Document Checklist:* `Homeless ▾`

🔍 Search

	Verification Item ↕	Acceptable Document*	Storage	Comment	Issuance Date	Expiration Date	Upload File	Associated File
☑	Housing Status	`Letter ▾`	`-- SELECT -- ▾`	Notice to Vacate by 08/28/2024 from LL	MM/DD/YYYY 📅	MM/DD/YYYY 📅	📄 Notice to Vacate.pdf ⚠ × 📷	↺
☐	Identity	`-- SELECT -- ▾`	`-- SELECT -- ▾`		MM/DD/YYYY 📅	MM/DD/YYYY 📅	Choose File 📷	
☐	Intake Document	`-- SELECT -- ▾`	`-- SELECT -- ▾`		MM/DD/YYYY 📅	MM/DD/YYYY 📅	Choose File 📷	
☐	Referral Packet	`-- SELECT -- ▾`	`-- SELECT -- ▾`		MM/DD/YYYY 📅	MM/DD/YYYY 📅	Choose File 📷	
☐	Release of Information	`-- SELECT -- ▾`	`-- SELECT -- ▾`		MM/DD/YYYY 📅	MM/DD/YYYY 📅	Choose File 📷	

Select the verification item. In this example, we'll be selecting "Housing Status".
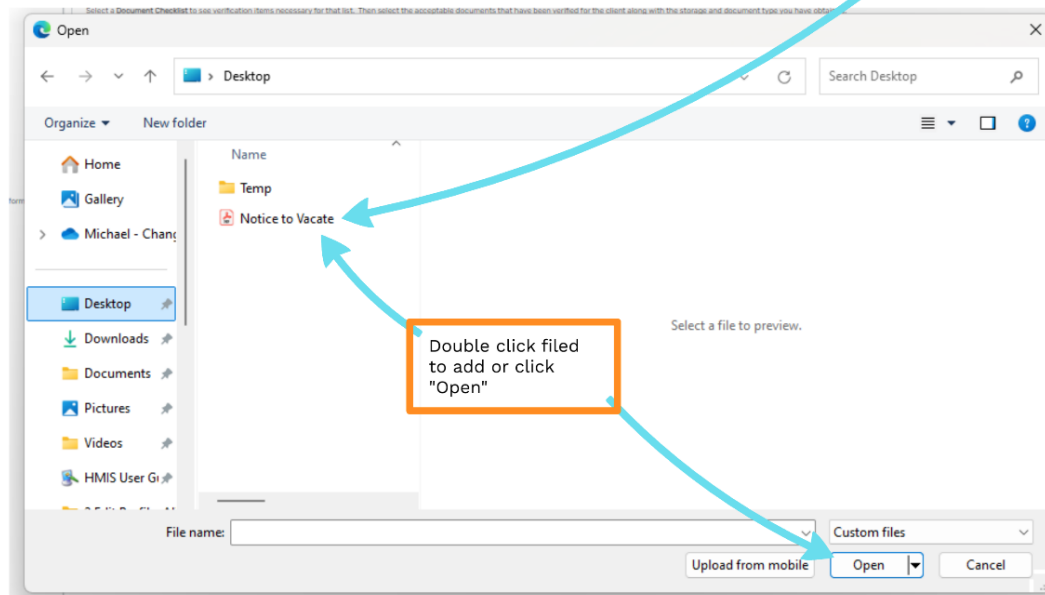
Select the acceptable document. In this example, we'll be selecting "Letter".

Adding a comment helps quickly identify a document later. The box will expand when you start to fill.

Select `Choose File` 📷 Once the file is uploaded, you will see the file name and the file type icon.

Delete associated file

Capture file image using device's built in camera.

Open

← → ∨ ↑ 💻 > Desktop

Search Desktop 🔍

Organize ▾   New folder

🏠 Home

🖼 Gallery

> 🟢 Michael - Chang

🖥 Desktop 📌

↓ Downloads 📌

📁 Documents 📌

🖼 Pictures 📌

📁 Videos 📌

HMIS User G 📌

Name

📁 Temp

📄 Notice to Vacate

Select a file to preview.

Double click filed to add or click "Open"

File name: `_____ ▾`   `Custom files ▾`

Upload from mobile   **Open** ▾   Cancel

💾 Save   ✓ Save & Close   Cancel

Step 8: An icon of the uploaded document can be found in the "Upload File" column. Click the "Save & Close" button. ClientTrack will navigate to the "Document Check History" workspace container. All uploaded documents will be listed.

Click "Save" to save, and click "Save & close" to save and exit.

Save Quick Document Check