

Editing Documents Uploaded in “Document Check”

Uploaded documents cannot be edited. Document Check details can be edited. Uploaded documents can be deleted and replaced.

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 on the action button next to the document to edit. Select “Edit Document Check”

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

Clients / Document Check History

Lebron James
624

4/4/1994
904-555-8458

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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. Select **Preview File** to view a preview of the uploaded file.

+ Add New Document Check

Quick Document Check

Multi File Download

19 results found.

Verified Item	Accepted Document	Comments	Verification Date	Download File
...	Identity	Driver's License	08/29/2024	<input type="checkbox"/>
...	Housing Status	Letter	07/25/2024	<input type="checkbox"/>
...		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"/>

Click "action button"

Click "edit document check"

Editing Entries in Document Check

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

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

The screenshot shows the ClientTrack interface. On the left is a dark blue sidebar with a search bar and a list of navigation items: Find Client, HMIS Intake, Client Files, Document Check (highlighted), Client Dashboard, Edit Client, Address History, Client Photo, Interested Others, Case Managers, Notifications, Alias History, Document Check (expanded), Client Files, ID Card, Case Notes, and Assessments. The main content area has a breadcrumb trail: Clients / Document Check History / Document Check. Below this is a client profile for Lebron James (624) with a birth date of 4/4/1994 and a phone number 904-555-8458. The 'Document Check' form is titled and contains instructions: '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.' The form fields include: Document Checklist (dropdown), Item Requiring Verification (dropdown), Acceptable Document (dropdown), Storage (dropdown), Comments (text area), Verification Date (date picker set to 08/16/2024), Issuance Date (date picker), Expiration Date (date picker), and Upload File (button with 'Choose File' and a camera icon).

Document Check Form

Step 5: After edits are completed, click “Save”. ClientTrack will navigate to the “Document Check History” workspace container.