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”.

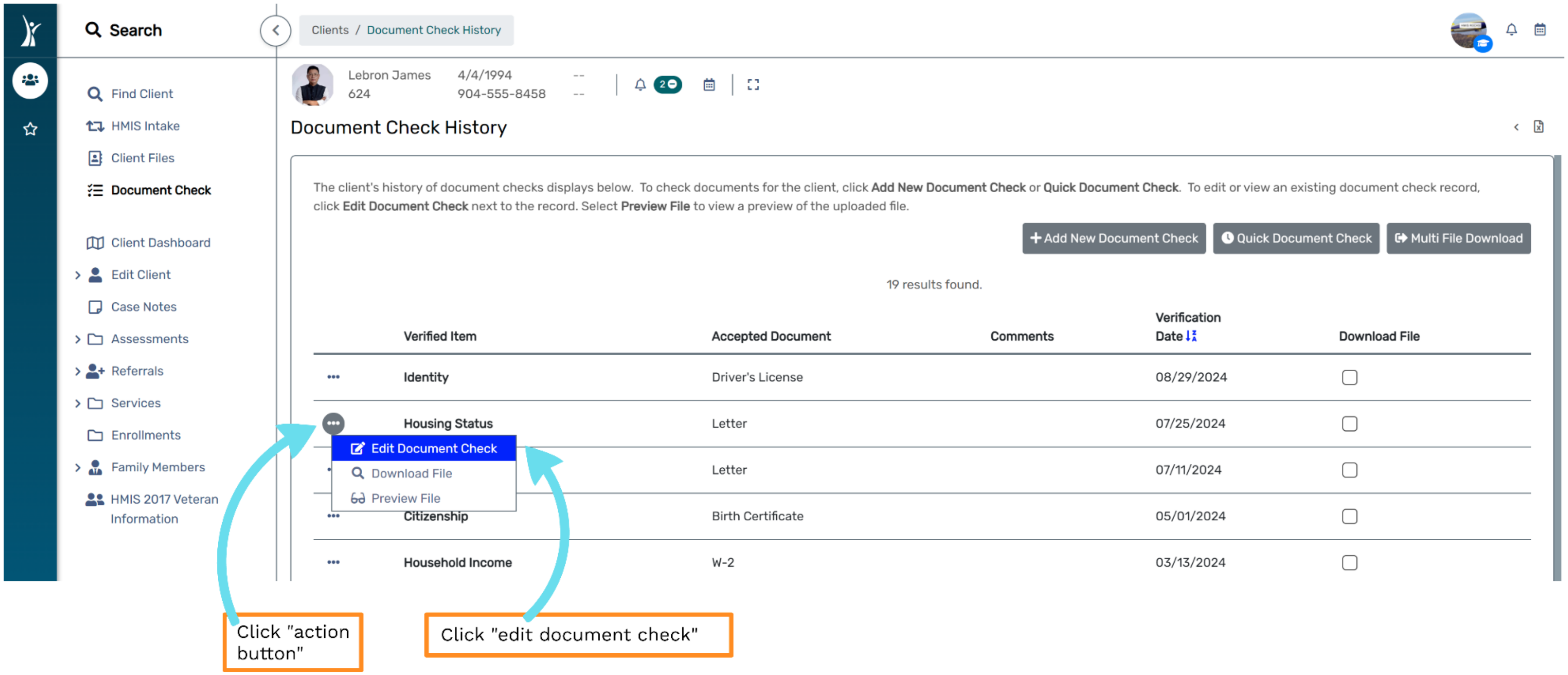
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using “Find Client” *in the* “HMIS Basic User 2025 Manual”.

**** 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”.

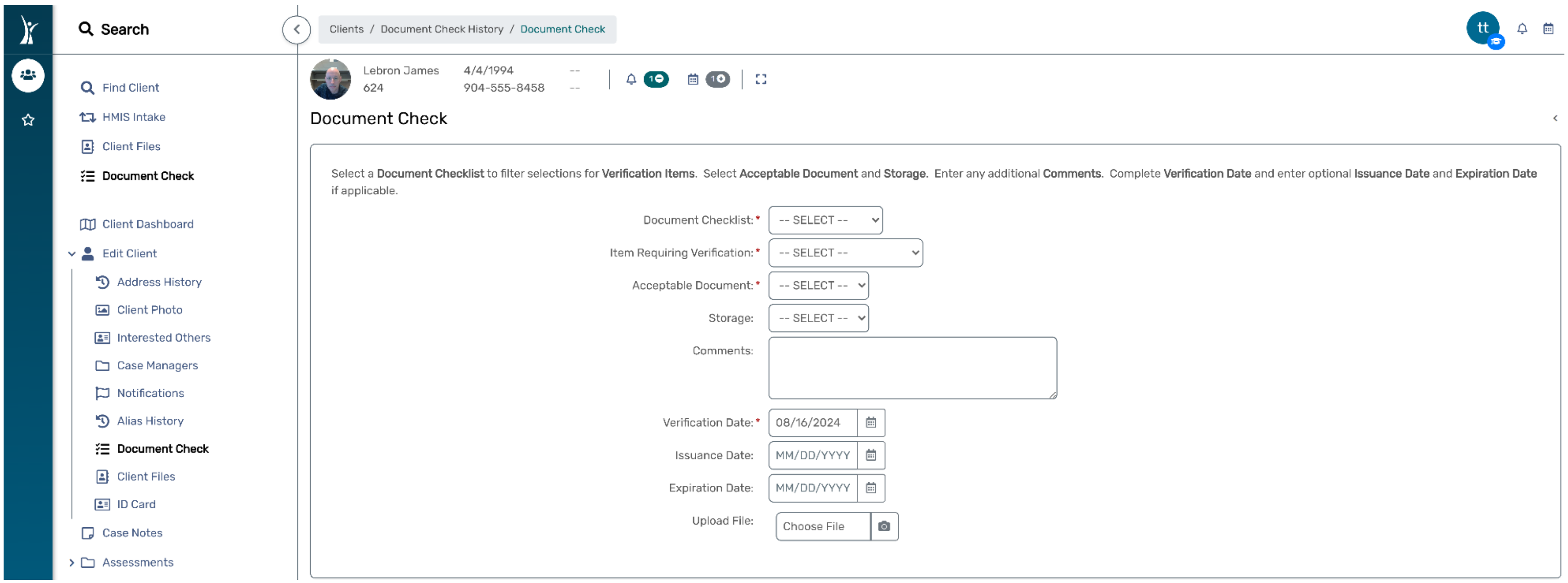
Step 3: Click on the action button next to the document to edit.   Select “Edit Document Check”



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 Optoins, Folders, and Subfolder/Document Check: Folder/*Document Check – File Categorization Methodology.



Document Check Form

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