

Downloading Documents in “Document Check”

Downloading a Single Document 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: To download, click the action button next to the appropriate file.

Step 4: Select “Download File” to start the downloading the file.

Click the action button on the file to be downloaded, and select "Download File".

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"/>
✎ Edit Document Check				
🔍 Download File	Letter		07/11/2024	<input type="checkbox"/>
📄 Preview File				
⋮ Citizenship	Birth Certificate		05/01/2024	<input type="checkbox"/>

Download Files in Document Check

Downloading Multiple Files at Once 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”.*

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**** 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: To download, click on the corresponding box under the “Download File” column.

Step 4: Select “Multi File Download” to start the files to be downloaded in a zipped folder.

Document Check History

After checking the boxes of the files to be downloaded, click the **Multi File Download** button to start a the download. The files will download in a zipped folder


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 checked="" type="checkbox"/>
***	Housing Status	Letter		07/11/2024	<input checked="" type="checkbox"/>
***	Citizenship	Birth Certificate		05/01/2024	<input checked="" type="checkbox"/>
***	Household Income	W-2		03/13/2024	<input type="checkbox"/>
***	Employment Eligibility	Birth Certificate		03/13/2024	<input type="checkbox"/>

Select files to download by checking box(es)

Download Multiple Files in Document Check

Step 5: Multiple files will download as a zipped folder. Extract the zipped folder to access downloaded files.