Previewing a 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 preview a file, click the action button next to the appropriate file.

Step 4: Select "Preview File". A pop-up window will appear with the file preview.

Printing Documents 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 print a file, click the action button next to the appropriate file and select "Download file"* or use the Multi File Download button.

*For instructions on how download documents in document check, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Document Check: Folder/Downloading Documents in "Document Check" in the "HMIS Basic User 2025 Manual".

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

Document Check History

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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	☐
	✎ Edit Document Check				
	🔍 Download File	Letter		07/11/2024	☐
	👓 Preview File				
•••	Citizenship	Birth Certificate		05/01/2024	☐

Download Files in Document Check

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

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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	☑
•••	Housing Status	Letter		07/11/2024	☑
•••	Citizenship	Birth Certificate		05/01/2024	☑
•••	Household Income	W-2		03/13/2024	☐
•••	Employment Eligibility	Birth Certificate		03/13/2024	☐

Select files to download by checking box(es)

Download Multiple Files in Document Check

Step 4: A single file download will download as a PDF. Multiple file downloads will be downloaded as a zipped file.

Step 5: Use local print procedures to print out downloaded documents.