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".

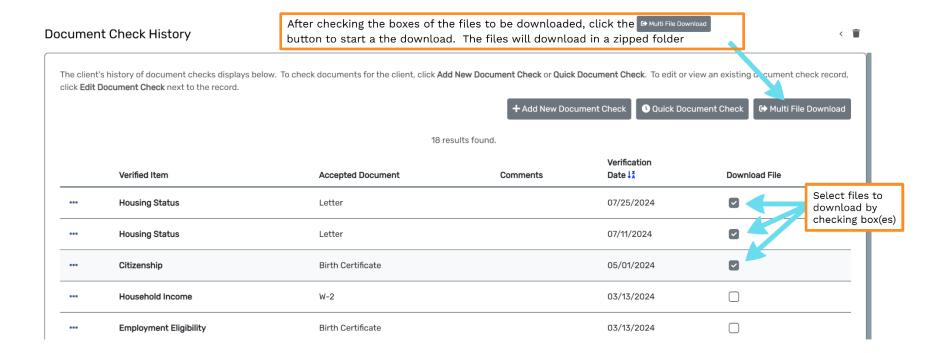
Click the action button on the file to be downloaded, and select "Download File".

Document Check History

	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↓ <mark>‡</mark>	Download File
	Housing Status Edit Document Check	Letter		07/25/2024	
	Q Download File	Letter		07/11/2024	
	•• Citizenship	Birth Certificate		05/01/2024	

Download Files in Document Check

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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.