

How To: Upload Documents to Client Records

Uploading Documents to a Client Enrolled in a Project

Step 1: Login to ClarityHS; locate the client record; and open the project enrollment.

Marlon Fox

PROFILE PROGRAMS NOTES FILES HISTORY LOCATION ASSESSMENTS

Train 01, Beez Kneez

TO

SEARCH CASELOAD

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
BK-NA-ES-Family Shelter-ESG Beez Kneez	04/10/2017	06/21/2018	Group

Household Members Manage

Tanya Fox Daughter

Step 2: Click on the **Files** tab in the Program window; then click on **Add File**.

Marlon Fox

PROFILE PROGRAMS NOTES FILES HISTORY LOCATION ASSESSMENTS

Train 01, Beez Kneez

TO

SEARCH CASELOAD

PROGRAM: BK-NA-ES-FAMILY SHELTER-ESG

Enrollment History Assessments Goals Notes **Files** Chart Forms Exit

Client Program Files LINK FROM FILES **ADD FILE**

260 DAYS INACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 04/10/2017

Program End Date: 06/21/2018

Assigned Staff: Train 01

Head of Household: Marlon Fox

Step 3: Using the dropdown controls, select the **Category** and **Name** for the file.

UPLOAD A FILE

Category 1. Core Housing and Eligibility

Name Birth Certificate

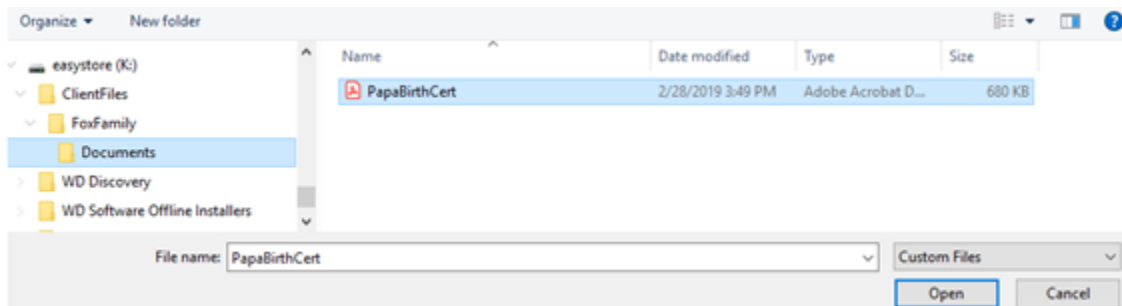
File Select File

Trouble attaching files? Switch to the Basic Uploader

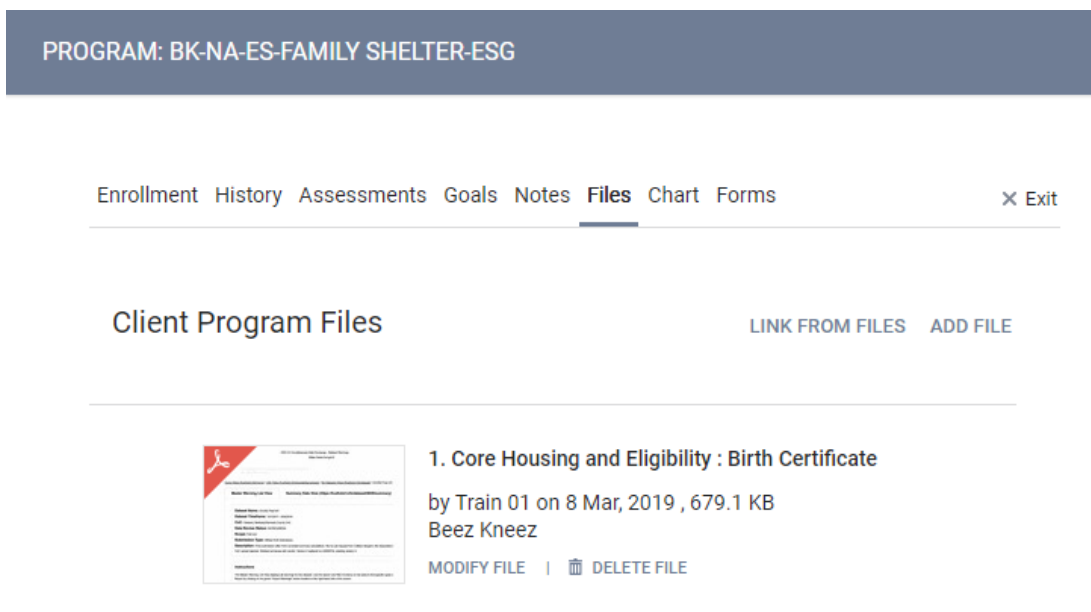
Alameda County Homeless Management Information System (ACHMIS)

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Step 4: Use the **Select File** button to locate the file to upload on your computer.



Step 5: Click on **Add Record** to load the file into ClarityHS. The uploaded file will show in the **Client Program Files** section of the client record.



The file will also appear in the Agency level **Files** tab with an indicator that it was uploaded for a project.

