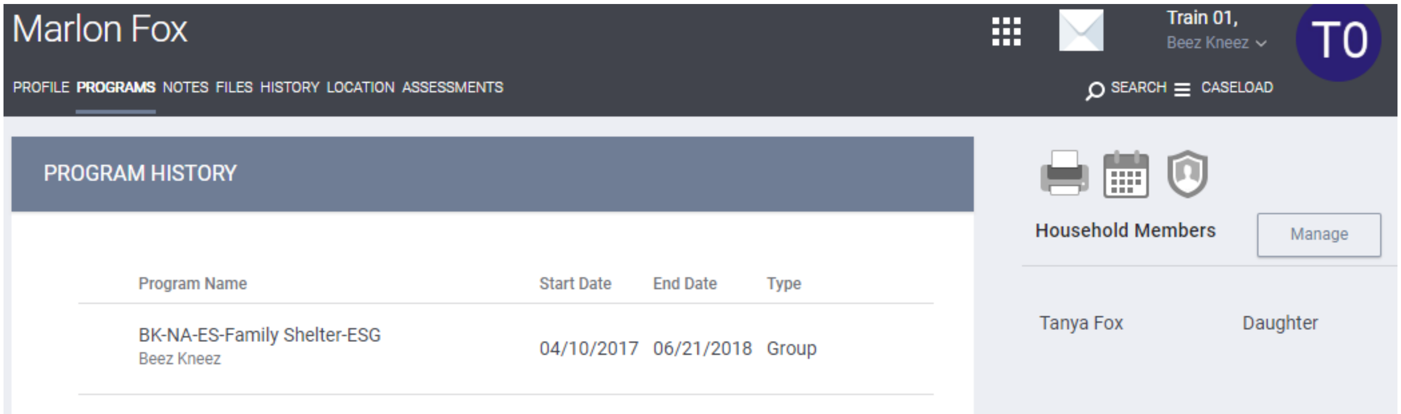
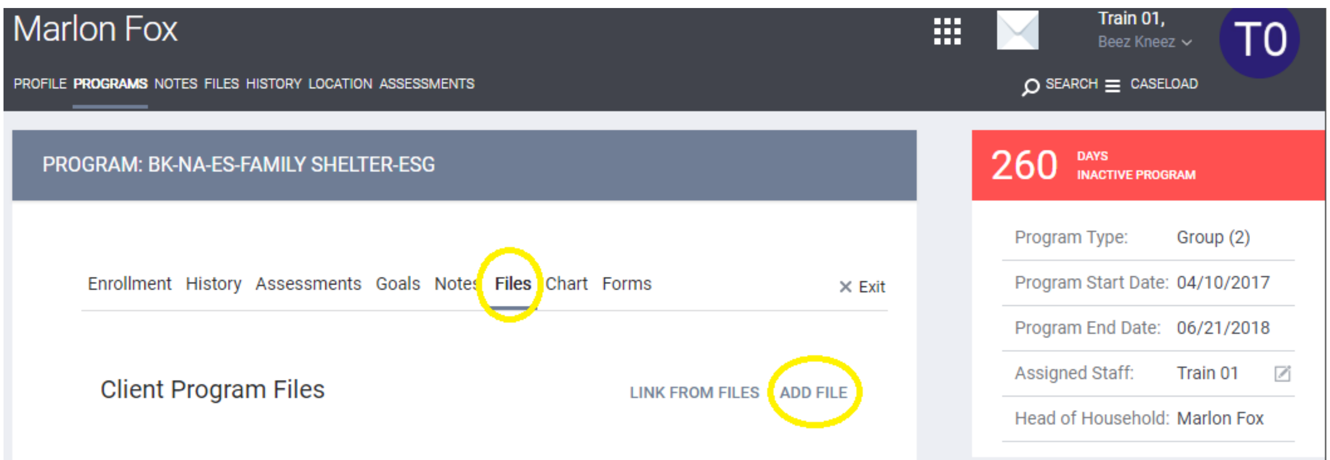
How To: Upload Documents to Client Records

Uploading Documents to a Client Enrolled in a Project

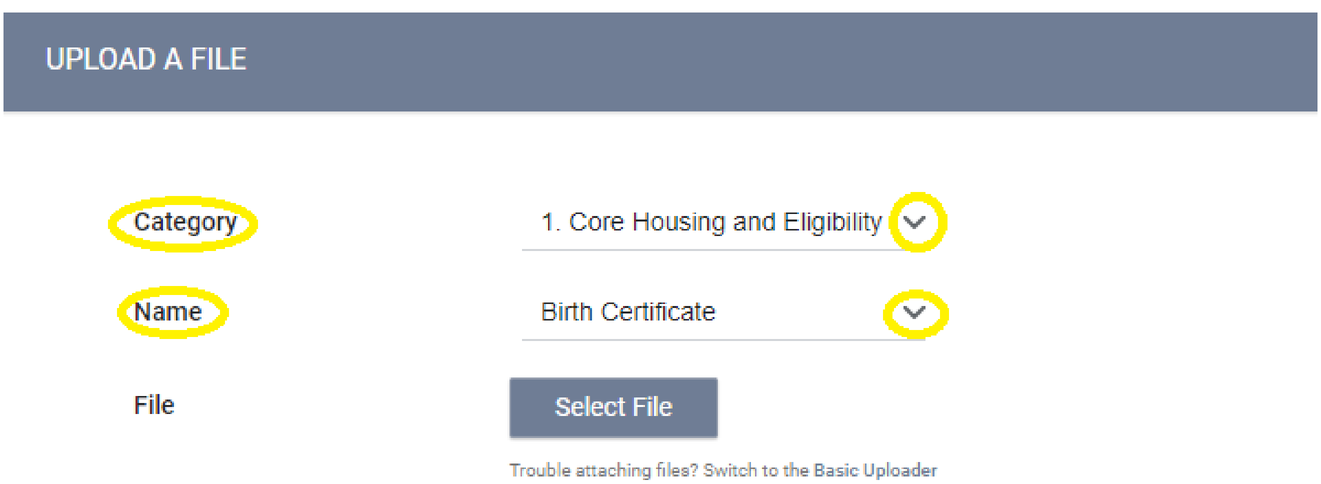
Step 1: Login to ClarityHS; locate the client record; and open the project enrollment.



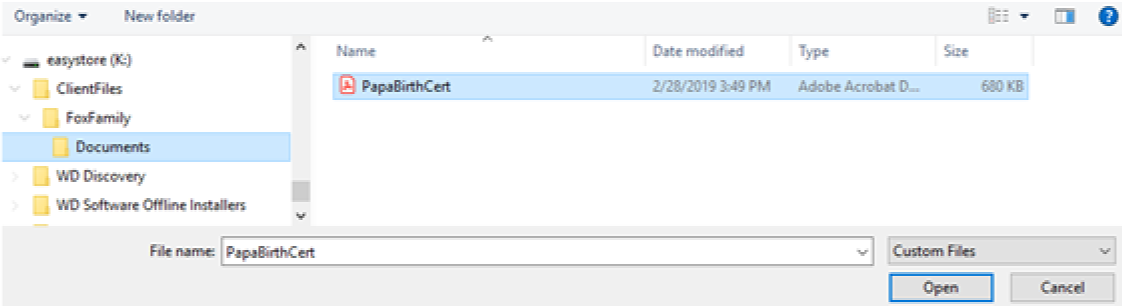
Step 2: Click on the **Files** tab in the Program window; then click on **Add File**.



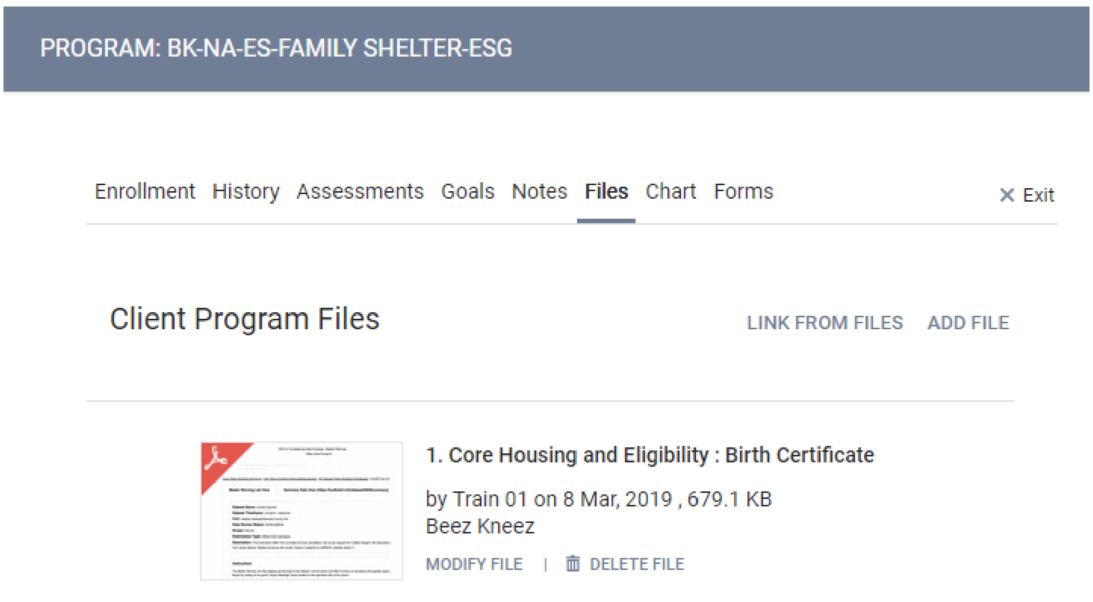
Step 3: Using the dropdown controls, select the **Category** and **Name** for the file.



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 is was uploaded for a project.