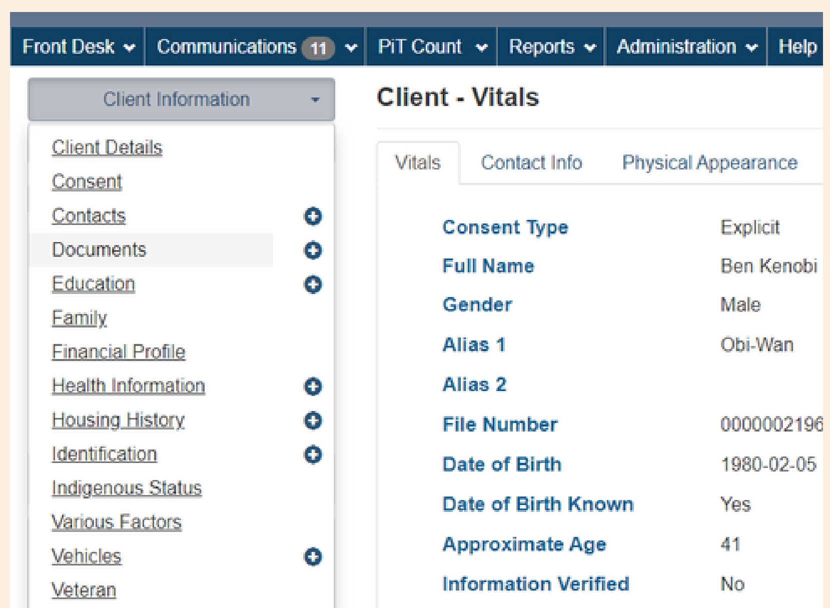
Updating Documents on a Client's File

Sometimes it is necessary to record another consent or add a copy of a driver's license, or many other types of identifying documents. The Documents Module is there to store any pieces of information you need

1.)Find your Client

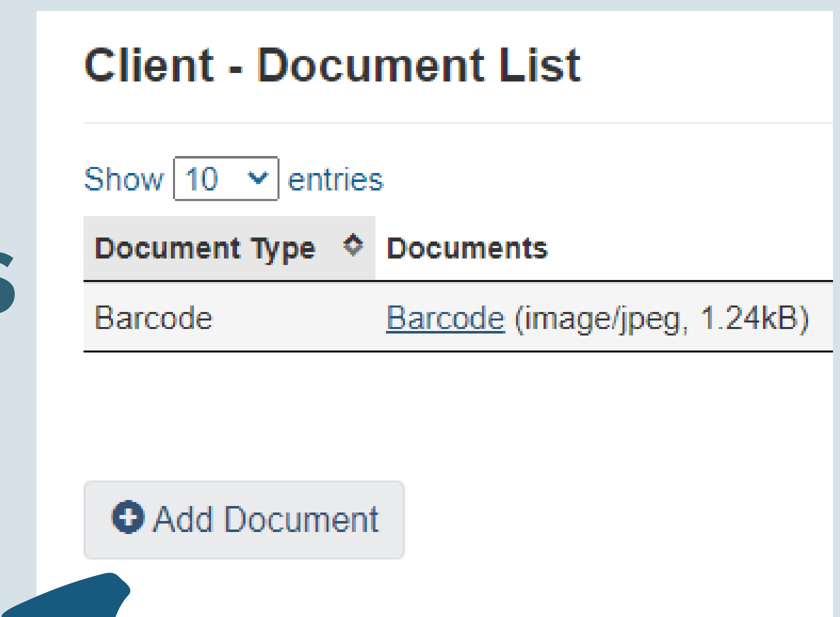
From the Client Vitals page, click Client Information.

Then Click on Documents.



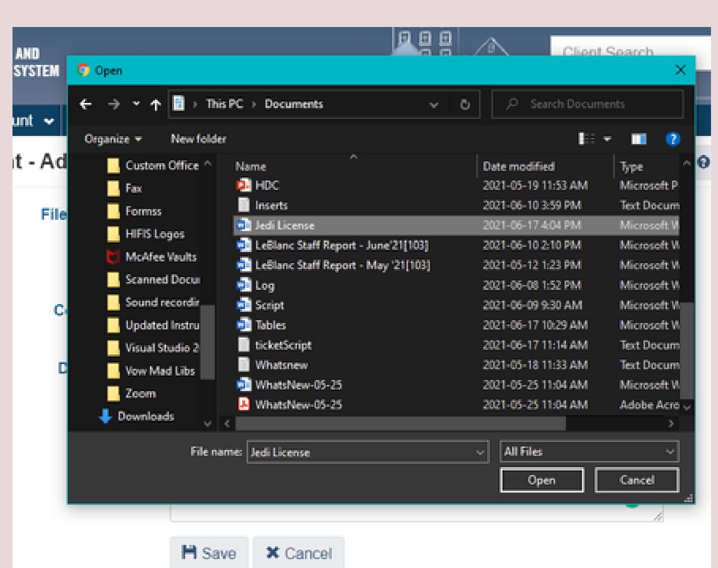
2.)Review Current Documents

Click the Add Document Button to get started.



3.)Click Choose File and Select your File.

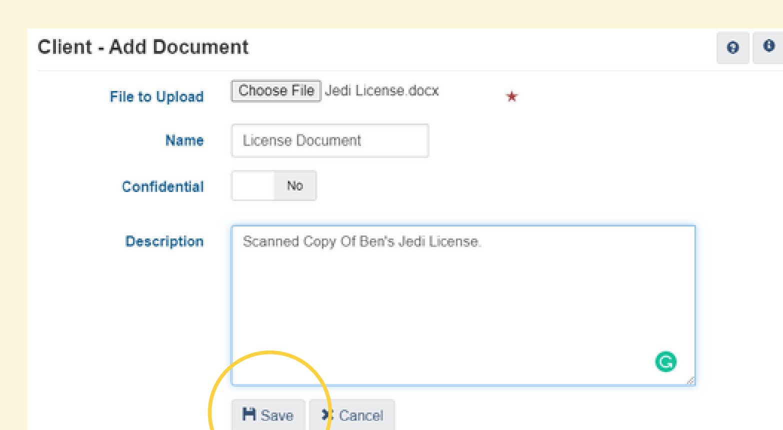
You will then have a popup where you choose the file you wish to upload.



4.)Give the file a name and description.

You can also choose whether the file is confidential or not.

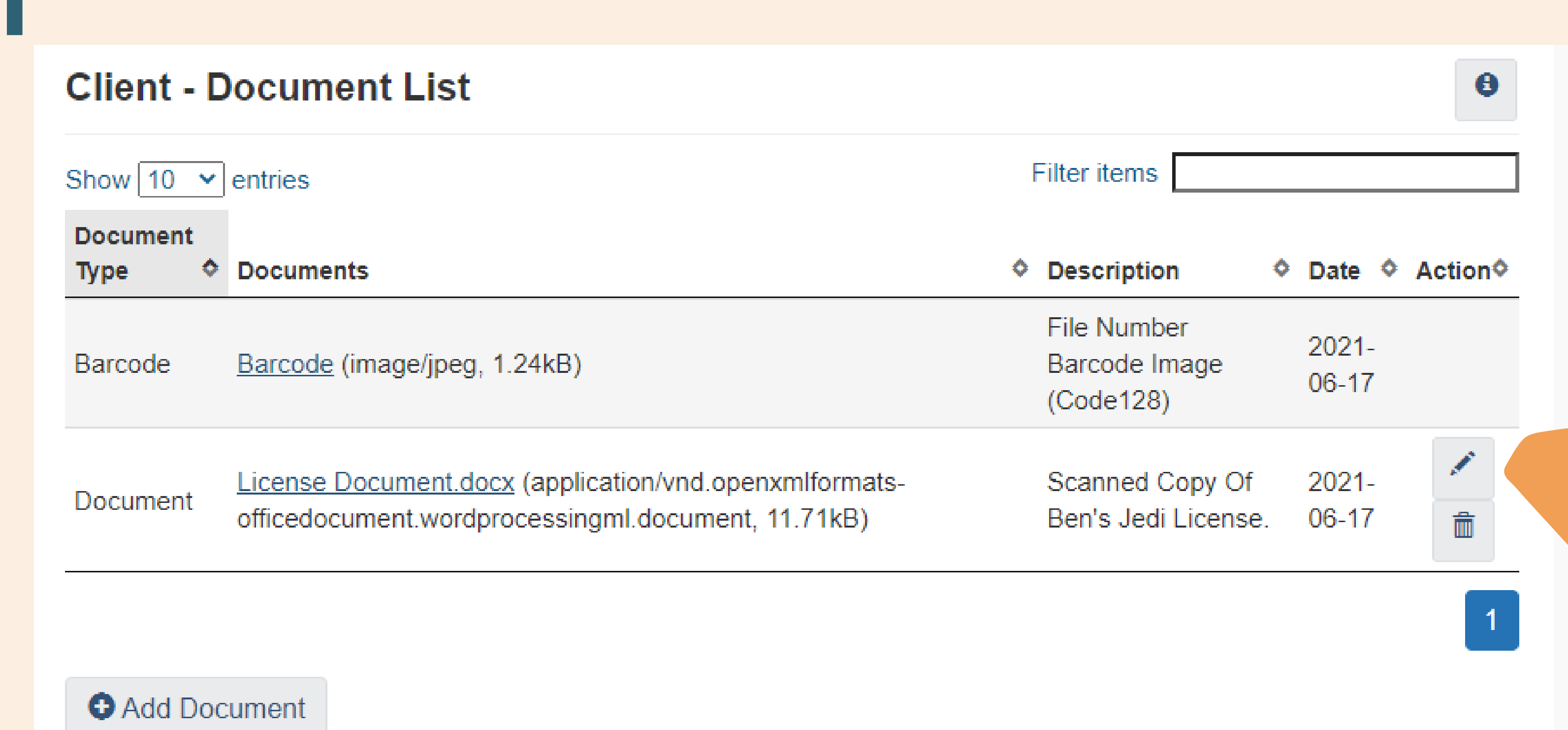
Click the Save button when finished.



Back to the Client Documents Tab

You should see the new upload you just saved!

If anything looks inaccurate or needs to be changed, click the pencil icon to edit.



Questions or Concerns? Email the team at hifis@sjhdc.ca

HUMAN DEVELOPMENT COUNCIL