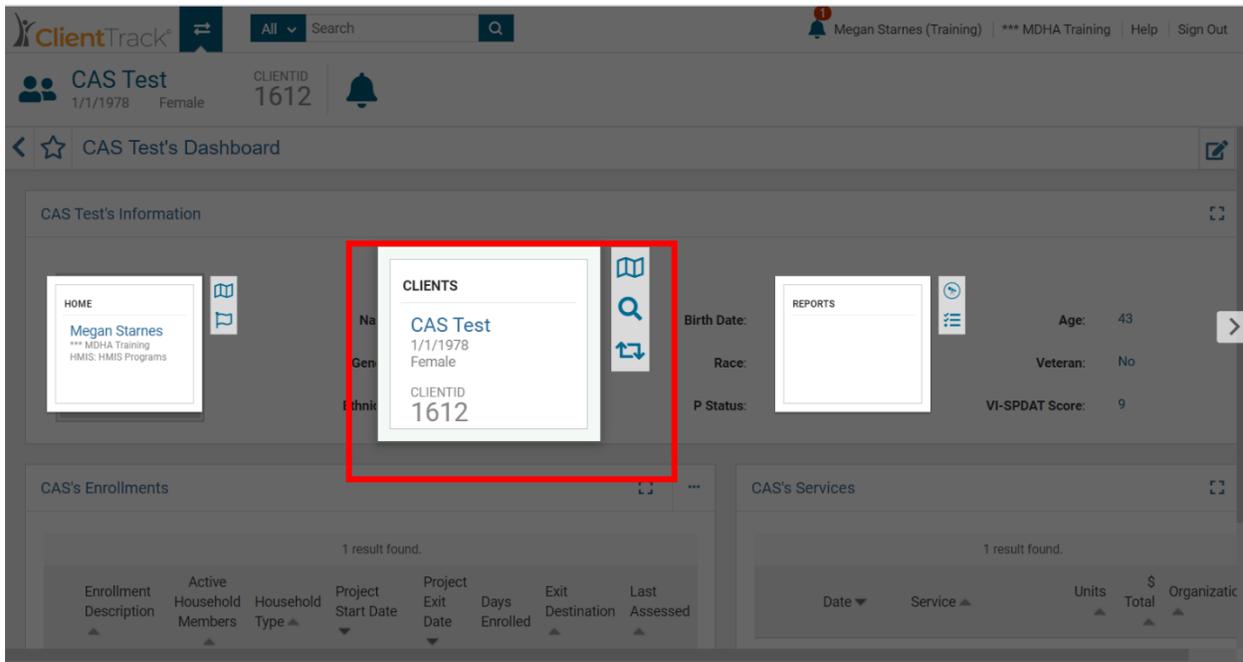


CAS Document Check

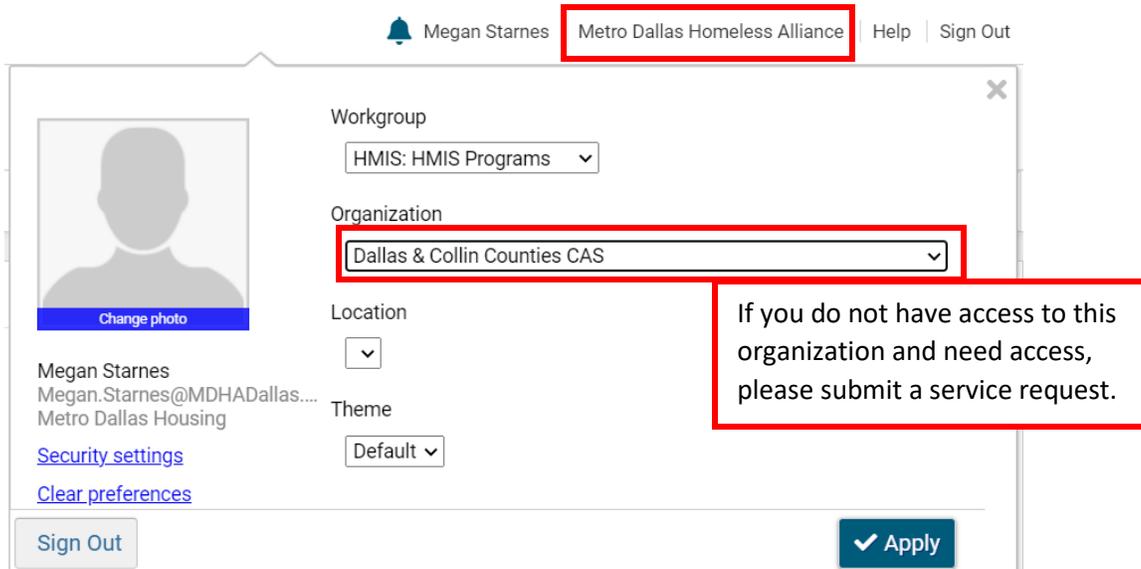
Video Tutorial

The Document Check feature should only be used for documents that are uploaded for the purposes of CAS, meaning the documentation is needed to get your client onto the HPL or referred to housing. Note that documents uploaded to Document Check are visible to all users with access to the Dallas and Collin Counties CAS organization, which could include users from different agencies.

1. Log in to ClientTrack and navigate to your Clients workspace.



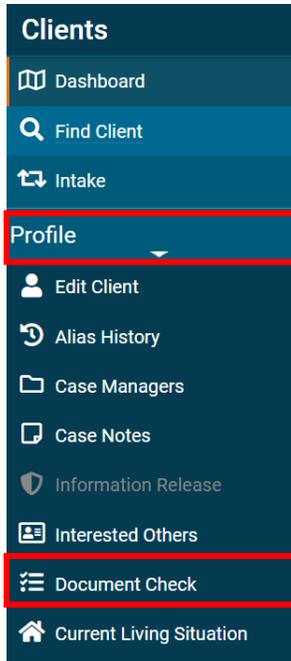
2. Click on your current Organization to open your account settings and change your Organization to Dallas and Collin Counties CAS.



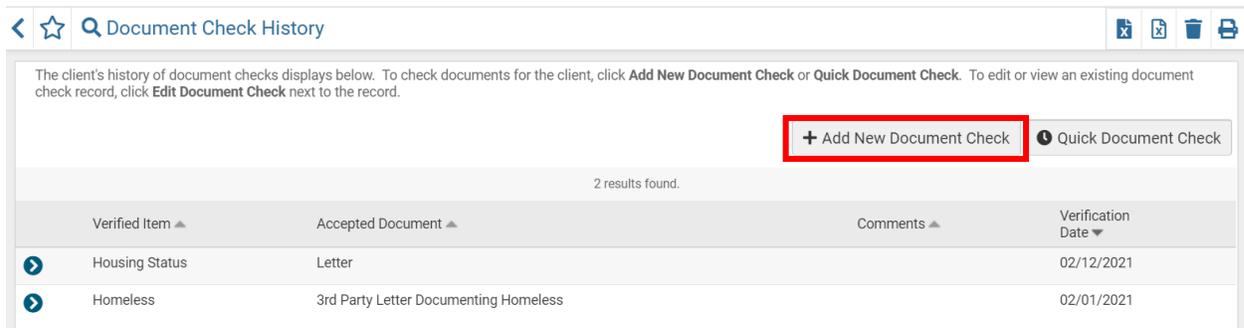
- Find your client by searching using their name or client ID.



- On the Favorites Menu, under Profile, select Document Check.



- The Document Check History page displays all documentation currently uploaded for this client. Use the Add New Document Check button to upload a new document.



6. Complete the required fields (marked by *). Note that not all fields are required. However, for Verification of Disability, an Upload File is required for your client to be referred to housing.

Follow the steps below based on whether you are uploading Documentation of Homelessness or Verification of Disability. Bold actions are required.

Documentation of Homeless

- a) Document Checklist: **Homeless**
- b) Item Requiring Verification: **Homeless**
- c) Acceptable Document: **select the document type** on file for the client
- d) Comments: only if needed (optional)
- e) Confirm the **Verification Date** is correct
- f) Click Choose File to upload the file (optional)
- g) Click **Save**

Verification of Disability

- a) Document Checklist: **Homeless**
- b) Item Requiring Verification: **Housing Status**
- c) Acceptable Document: **Letter**
- d) Comments: **“Certification of Disability”** (required)
- e) Confirm the **Verification Date** is correct
- f) Click Choose File to **upload the file** (required)
- g) Click **Save**

The screenshot shows the 'Document Check' form with the following fields and annotations:

- a** Document Checklist: * --SELECT--
- b** Item Requiring Verification: * --SELECT--
- c** Acceptable Document: * --SELECT--
- Storage: --SELECT--
- d** Comments: [Text area]
- e** Verification Date: * 02/12/2021 [Calendar icon]
- Issuance Date: [Calendar icon]
- Expiration Date: [Calendar icon]
- f** Upload File: Choose File [Camera icon]

At the bottom right, there is a red **g** annotation next to the **Save** button.