

## **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.

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

^	🌲 Megan Starnes	Metro Dallas Hor	meless Alliance	Help Sign Ou	t		
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Change photo Megan Starnes Megan.Starnes@MDHADallas Metro Dallas Housing	Location Theme		If you do not have access to this organization and need access, please submit a service request.				
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3. Find your client by searching using their name or client ID.



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



5. 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 of 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

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