

Uploading Documents Using the Verification Tool

The Verification Tool provides a central point for storing descriptive and image documentation of specific client characteristics and statuses [e.g. residence, citizenship, disability, employment, Ids, educational attainment, rental, utility, or medical bills].

NOTE: Prior to using the Verification Tool, scan the desired document and save as a PDF to a designated file on your computer. All documents must be scanned in black and white with your scanner set to 200 DPI. **HMIS will only recognize PDF files.**

Access the "Verification" tool by selecting it from the left sidebar menu. Any previously entered documents will be listed on the Verification screen.

To add a new document, click New Record.



The screenshot shows the 'Verification' tool interface. It includes sections for 'Specify Documentation Checklist and Matching Verification Records', 'Confirm or Add Verification Records to Complete Document Check List', and 'Type of Verification Documents Matching Search'. The 'New Record' button is highlighted with a red circle, and a red arrow points from the text 'click New Record' to it.

Select an Area Category and Type of Verification from the drop down menus.



The screenshot shows the 'Verification Record - Details' form. It includes fields for 'Area of Verification', 'Social Security Number', 'Type of Verification', 'Staff Verifying', 'Date Verified', and 'Name of Witness'. The 'Browse...' button is highlighted with a red circle, and a red arrow points from the text 'Click the Browse button' to it.

Click the Browse button to select the document from the correct file on your computer.

Once you have located and selected the document from your computer, click the Upload and View Image button.

Address:

9101 W. Sahara Ave #105-158
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When the file has uploaded, you can select "Click to View PDF File" to verify the document loaded properly.

Click "Save & Close" or the document will not be saved.

The saved document will now be listed on the Verification screen. You can then move on to other areas of the client file or click "New Record" to add another document.

[1] Specify Documentation Checklist and Matching Verification Records:

Area of Verification: Provider:

Program-Specific Check List: After Date:

[2] Confirm or Add Verification Records to Complete Document Check List:

Area of Verification Check-List:
 Check List Status: No Verification
 0 Rec.

Type of Verification Documents Matching Search:
 Filter Type of Document by Selected [] in Check-List
 Continuous List
 Paged List
 1 Records.

Open	Copy	Type of Document	Area of Verification	Date	Delete
		Social Security Card	Personal Identification	12/20/2010	

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