

Uploading and Unlocking Entry Point Document Instructions

1. Scan the document and save it to your computer.
2. Locate the uploaded document and save it with a name you will easily be able to recognize when searching for it.
3. Access the client in HMIS.
4. Click on the "Client Profile" tab in HMIS.
5. Scroll down to the "File Attachments" sub-assessment.
6. Click "Add New File Attachment".
7. Select "Choose File" and locate the document from the folder in which you saved it when it was scanned.
8. Double click the document or click on the document name once and select "Open".
9. You will now see the selected document next to the "Choose" button.
10. **In the "Description" box, enter the title provided below in BOLD for the given document you are uploading from the Phased Assessment:**
 - a. **"CE-VISPDAT Consent"** (included in Part 4)
 - b. **"CE-Part 4"** (Part 4 A and B)
 - c. **"CE-Homelessness History"** (Part 5 C with all homelessness verification documentation)
 - i. When uploading Shelter Stays (from HMIS), use the description
"CE-Homelessness History – Shelter Stays"
 - d. **"CE-Disability Verification"**
 - e. **"CE-Part 5 Other"** (Part A, B, D, E, F and G)
 - f. **"CE-Part 6"**
11. Select "Upload"
12. The uploaded document will now appear in the "File Attachments" sub-assessment on the selected client's "Client Profile" tab.
13. Once uploaded into HMIS, unlock these documents to "Alliance Projects".
 - a. Click the red lock in the right-most column of the document to be unlocked.
 - b. Click 'Add Visibility Group'.
 - c. Search for 'Alliance Projects'.
 - d. Click the green plus symbol next to 'Alliance Projects'.
 - e. Click 'Exit'.