

UPLOADING DOCUMENTS TO A CLIENT'S PROFILE

NOTES : Rules for uploading documents are:

- -File type must be **PDF only**.
- -File size must be **2mb or less** (check your document properties for file size)
- -File name must be **15 characters or less** – NO Spaces

From the **Intake Form** of the case, at the bottom of the page, there are two places you can store pdfs:

1. Client PDFs
2. Case PDFs

The screenshot shows a web interface with several sections: 'Additional Information' (with a 'Click to Add Text' link), 'Check List' (with a '(Click to edit checklist)' link and a 'Check time' button), and 'Uploaded File(s)'. The 'Uploaded File(s)' section contains two entries: 'Client (#1) Deans T. (Add client file)' and 'Case (#1) JHS Ottawa (Add case file)'. A red triangle is drawn over the 'Uploaded File(s)' section, pointing from the center down to the two links.

[#1] Deans Test [# 1] John Howard Ottawa
JHSCANADA's Worker: **Kassandra Roy, Sue Morse**
Current Status: **Wait** Status Date: 2018-06-05

Select the appropriate option:

Client PDFs

Client PDFs are **accessible to all workers that work with Client** in (any case past or present)

Case PDFs

Case PDFs are **only accessible to active caseworkers**.

Example: if a person was enrolled, discharged, and then enrolled a second time, the person would have **one client profile** but **two cases** associated to his/her name.

- If PDFs were uploaded to the Client section, all new and old caseworkers who were assigned to the client's profile will be able to view the documents.