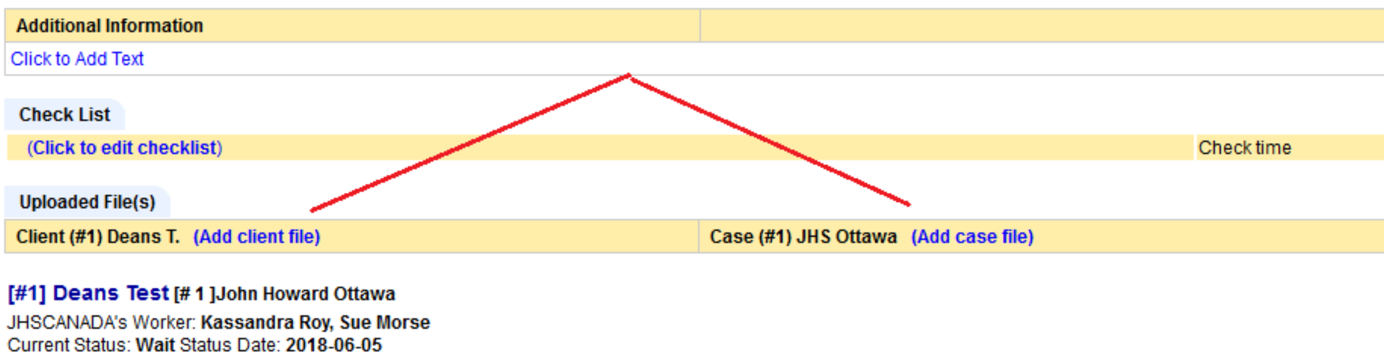
UPLOADING DOCUMENTS TO A CLIENT'S PROFILE

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



Select the appropriate option:

Client PFDs
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.