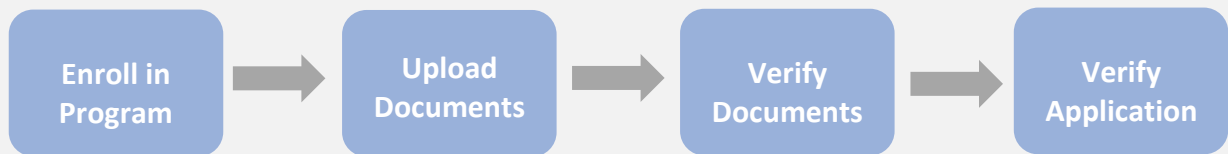




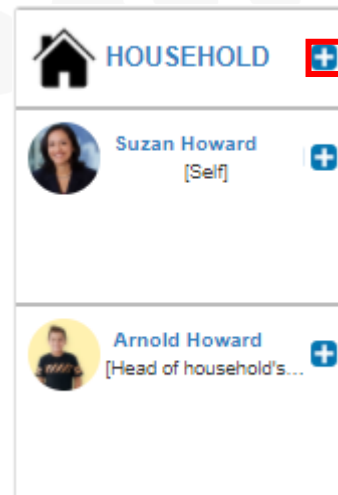
## Summary

On the Application page, use the Documents tab to add, edit, delete and verify documents. If an Organization has Forms available, you may select the Program Forms icon. Documents may be added for the entire Household or for individual Household Members. You can upload documents only to applicants that are not verified; if the application has been verified, unlock it, and then relock it after the upload is complete.



## Add Document Category

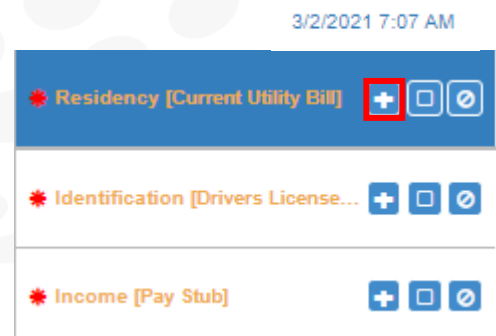
- Locate a Client using the Look-Up search function at the top of the page or the Application List Popover
- Once you have located your client, click on **+** to **ADD A NEW TYPE OF DOCUMENT TO BE UPLOADED** next to **HOUSEHOLD** or next to the name of an individual household member to add a new document category
- Select a document type from the dropdown menu
- Click **SAVE**

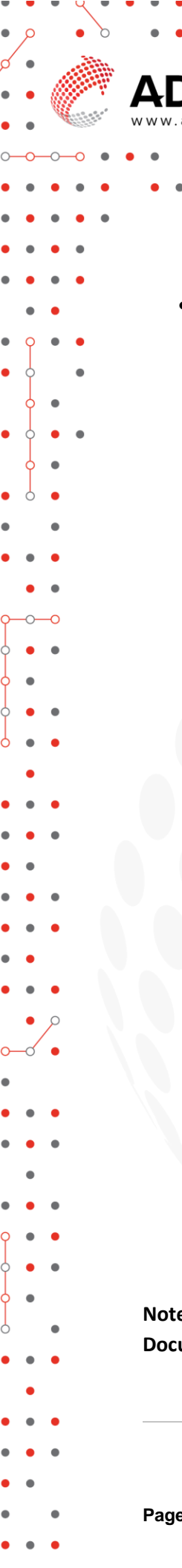




**Note:** Document Categories need to be setup under the Configuration role Document Setup page for dropdowns to appear.

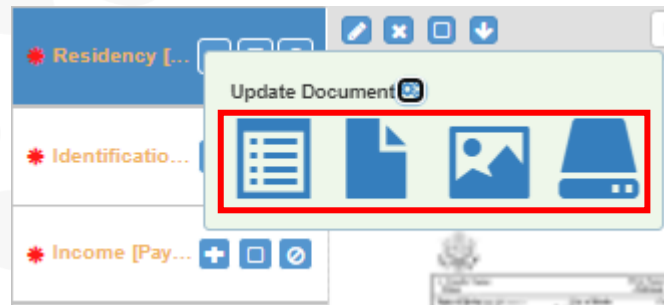
## Add Document(s)

- Click **ADD DOCUMENT** **+** next to document type to update and upload document.
  - Required documents will be marked with a red asterisk.
  - Click the **ADD DOCUMENT** button again to add more documents to that document type.
    - Document(s) uploaded will display on the right.
    - Uploaded documents have date and timestamp above the document list

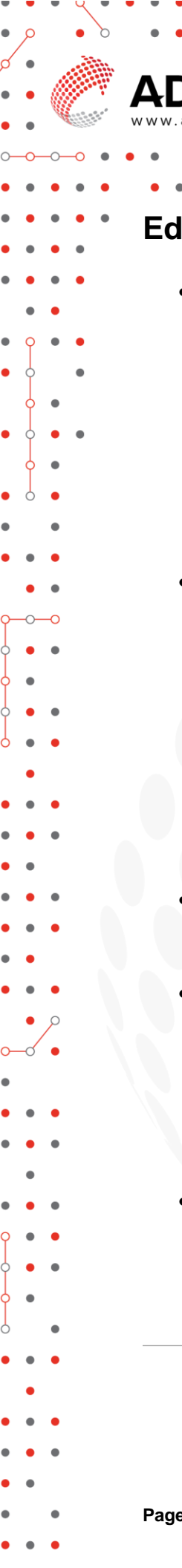








- Click the **Refresh**  button next to Document to refresh Document tab page
- Click the **Forms**  button to add forms
- In the **Update Document** popup window, select one of the document update options.
  - Click the **SELECT FROM DOCUMENT INVENTORY** button to **upload a file(s) from your device.**
    - Select document or image from the Document Inventory
    - Click **APPLY**
  - Click the **SELECT FROM FILE DIRECTORY** button to **upload a file(s) from your device.**
    - Select document or image from your computers file directory.
    - To select just one file, click on the one document image.
    - To select multiple files, click on the checkmark box at the top left side of each document image.
    - After selecting a file or multiple files, click Open.
  - Click the **ADD FROM IMAGE** button to **update or take a photo.**
    - Click **UPDATE PHOTO** to update an existing photo with a file from your device or click **TAKE PHOTO** to take a picture with your device's camera.
    - Click **UPDATE** to save your photo.
  - Click the **ADD FROM SCANNED** button to **scan an image.**
    - Click **SCAN** (you will be prompted to select a printer)
    - Click **LOAD** to load an image.
    - Click **UPDATE** to save your image.



**Note:** You can test your scanner by clicking on the **TEST** icon the popup window, next to **Update Document**, click on the **TEST** icon to test your scanner.





## Edit Document(s)

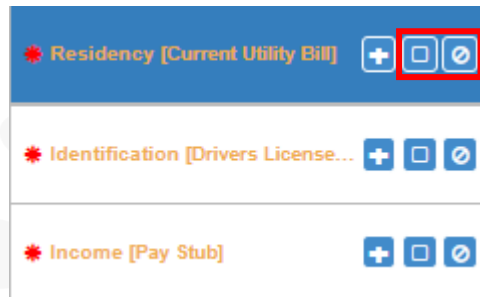
- Click on the title of a Document Category that has documents.
  - The document uploaded will be displayed on the right.
  - If there are multiple documents, use the **Arrow** navigation bar above the document to search.
  - Use the **Plus** and **Minus** icons to zoom in and out of selected document.
- Click the **EDIT**  button to edit the selected document information.
  - In the Document popup window:
    - Mark the **Active** box, to mark whether the document is Active or not.
    - Update the Document Name, Consent, Document Date, Expiration Date and Description.
  - Click **SAVE**
- Click the **DELETE**  button to delete the selected document information.
  - In the popup window, click **YES** or **NO**
- Click the **APPROVE OR DENY CURRENT DOCUMENT**  button to Approve or Deny the selected document information.
  - In the popup window, select Approve or Deny
  - Click **SAVE**
- Click the **DOWNLOAD**  button to download the selected document information.
  - Document will automatically download to device








## Approve or Deny Document Type




- Select the Document Category to Approve
  - Click the **APPROVE**  button to Approve document type
  - In **Approve Comment** popup window:
    - Enter Date, Reason and Comment
  - Click **SAVE**
- Select the Document Category to Deny
  - Click the **DENY**  button to Deny a document type
  - In **Deny** popup window:
    - Enter Deny Reason and Deny Comment
  - Click **SAVE**



## Verify Document(s)

- Document Categories are color coded and listed next to Household or Individual Client name
  - Category Name display in Gray = file Not Provided
  - Category Name display in Orange = file Provided
  - Category Name display in Red = file Denied
  - Category Name display in Green = file Approved
- Once all documents have been verified, click on the **UNLOCKED**  icon to change application to **LOCKED**  status.
  - To make edits to application and documents, click the **LOCKED**  button to Unlock

Required Document Summary	Not Provided	Provided	Denied	Approved
	7	0	0	0

HOUSEHOLD	Residency [Current Ut...]
 Suzan Howard [Self]	Identification [Drivers ...] Income [Pay Stub]
 Arnold Howard [Head of househ...	Identification [Drivers ...] Income [Pay Stub]
 Martha Howard [Head of househ...	Identification [Drivers ...] Income [Pay Stub]

**Note:** The document type will be color-coded based on the status.