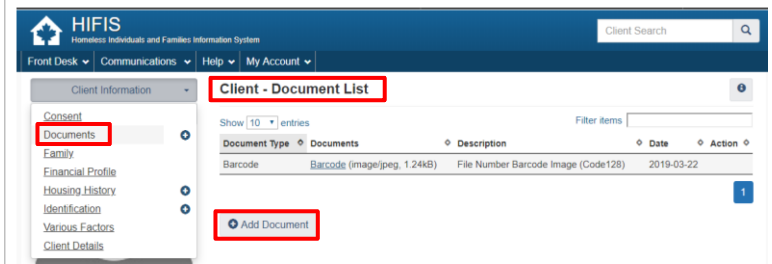
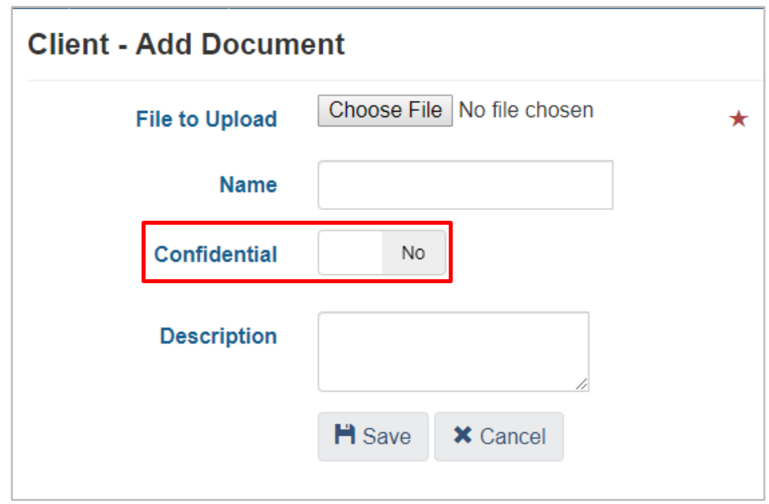
How To Add a Document about a Client

1. Open a **Client File**
2. Go to **Client Documents**
   a. Click on the **Client Information** menu
   b. Click on **Documents**
3. Add Document
   a. Click **Browse....**
   b. In the File Upload window, navigate to and select the file you wish to upload from your computer
   c. Click **Open**
   d. The File Upload window will close and your file name will be listed in the Attachments field
   e. Optionally, add a *Name* for this Document
   f. Indicate whether this Document is *Confidential*
   g. Optionally, record a *Description* about this Document
4. Click **SAVE** when done.





Help Support: HIFIS@simcoe.ca
HIFIS Support Centre: https://www.simcoe.ca/hifis