



Client Attachment New Document Screen Updated on October 2023

Home > Client Management (Search Client) > Attachment > New Document

Business Purpose:

The **Attachment New Document** page allows you to create a new attachment record by entering the client **Document type***, **Expiry Type***, **Program***, **File Name**. **Client Information** tab on the top: Client No, Client Name: Age, DOB.

How to:

1. Clicking on the **New Document** button will take the user to the **Add Document to Client File** view/page.

Client No: 729650	Client Name: On	e, Test	6	Age: 27		DOB: 1996/09/09
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			⊡Upload			

- 2. Click on the **Document type*** dropdown list and select one of the options.
- 3. Click on the **Expiry Date*** calendar icon and select a expiration date.
- 4. Click on **Program*** dropdown list and select one of the programs.
- 5. Click on the Browse in the File Name* field and select a file.
- 6. Click on the Upload green button, and then Close it. A new document record should be created.

Client Information											
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Important Notes:

- 1. The availability of the **Expiry Date** * field depends on the selected **Document type**
- 2. Once Attachment record is created it will be displayed elsewhere (Intake/Identification on record) in SMIS, where applicable.