toronto SMIS Shelter Management Information System

TORONTO

# Client Attachment New Document Screen

*Updated on October 2023*

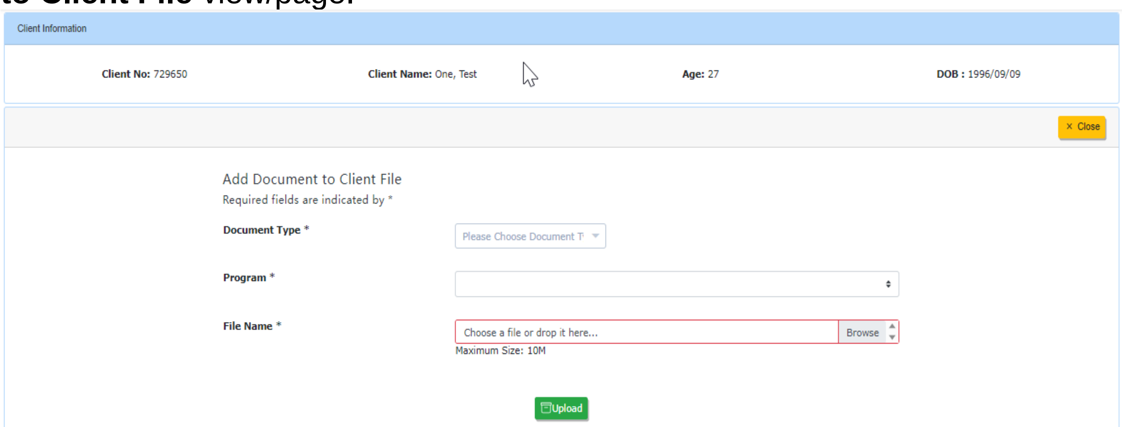
**Home > Client Management (Search Client) > Attachment > New Document**

## Business Purpose:

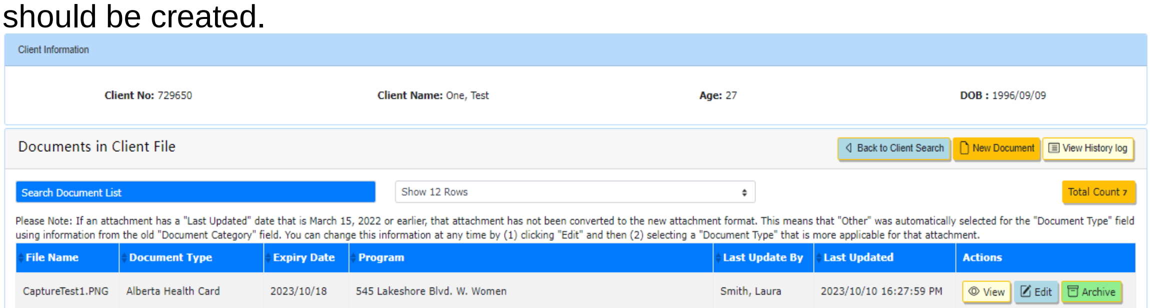
The **Attachment New Document** page allows you to create a new attachment record by entering the client **Document type***, **Expiry Type***, **Program***, **File Name**.
**Client Information** tab on the top: Client No, Client Name: Age, DOB.

## How to:

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




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.



**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.