Client Attachment Screen

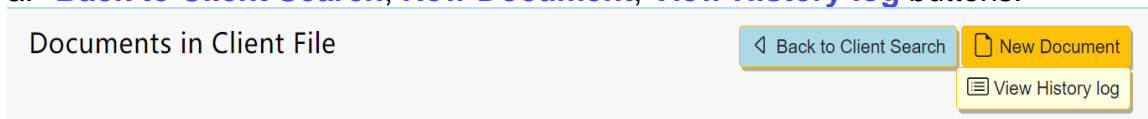**Home > Client Management (Search Client) > Attachment**

Business Purpose:

The **Attachment** page displays a tabular listing of the client's attachment records for all programs the user has access to.

How to:

1. **Client Information** tab: *Client No*, *Client Name*, *Age*, *DOB*.
2. **Document in Client File** tab:
   a. **Back to Client Search**, **New Document**, **View History log** buttons.

   - Click on Back to Client Search button – takes you to the Search - Client Management page
   - Click on New Document button– takes you to the Add Document to Client File view. The ability to create a new attachment record with the client **Document type***, **Expiry Date***, **Program***, **File Name*** fields.
   - Click on View History log button - takes you to the Attachment History Log view.

   b. **Search Document List** drop-down and Total Count information.
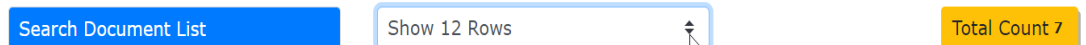
   Please Note: If an attachment has a "Last U[...]r earlier, that attachment has not been converted to the new attachment format. T[...]ally selected for the "Document Type" field using information from the old "Document [...]ormation at any time by (1) clicking "Edit" and then (2) selecting a "Document Type" that is more applicable for that attachment.

   c. There are attachment records in the tab with the following column headings: **File Name**, **Document Type**, **Expiry Date**, **Program**, **Last Updated By**, **Last Updated** and **Actions.**
      - Each of the column headings are clickable and will execute a sort alternating between ascending and descending based upon the column heading. (For example, when you click on the **Last Updated**, the attachment records are then sorted in ascending order, with the oldest **Last Updated** first.)

File Name	Document Type	Expiry Date	Program	Last Update By	Last Updated	Actions
CaptureTest1.PNG	Canadian Citizenship Card	Not Applicable	Agincourt Community Services Association Streets to Homes Outreach	Smith, Laura	2023/10/05 13:57:18 PM	View / Edit / Archive
CaptureTest1.PNG	Canadian Citizenship Card	Not Applicable	545 Lakeshore Blvd. W. Women	Smith, Laura	2023/10/05 13:55:41 PM	View / Edit / Archive
CaptureTest1.PNG	Case Plan	Not Applicable	545 Lakeshore Blvd. W. Women	Smith, Laura	2023/10/10 11:18:17 AM	View / Restore

d. The last column is **Action** and contains the following buttons: View, Edit, Archive and Restore.

- Click on View button – the attachment will open in a new window. There are two options/buttons in the document: Export and Go Back**.**
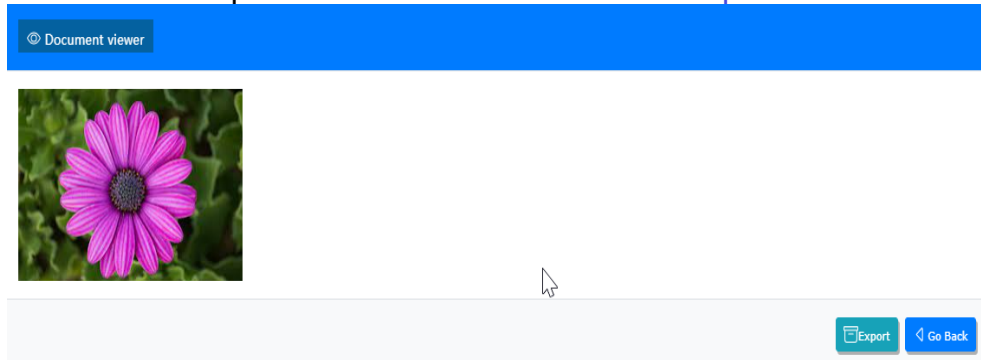
  - ✓ If Export button is selected, a download pop-up window will appear.
  - ✓ If Go Back button is selected, the Document viewer will close.
- Click on Edit button – the ability to change/replace the client document type, program, file name (another attached document). Once the information is updated, click on the Update button, and then Close it.
- Click on Archive button – a new Archive Attachment window will open. Click on Confirm or Cancel button.

Archive Attachment

ⓘ By clicking this "Archive" button you will deactivate this attachment. This means that this attachment will now be considered inactive, where it (1) will no longer be displayed as an active "Document on Record", and (2) will be bumped to the bottom of the attachments list in the "Attachments" Module. You can re-activate this attachment at any time by going to the "Attachments" module and clicking the "Restore" button for this attachment

[Confirm] [Cancel]

- ✓ If Confirm button is selected, this attachment will now be considered inactive, where it (1) will no longer be displayed as an active "Document on Record", and (2) will be bumped to the bottom of the attachments list in the "Attachments" Module.
- ✓ If Cancel button is selected, the window will close, but the attachment will remain in place.
- • Click on Restore button - a new Restore Attachment window will open. Click on Confirm or Cancel button.

Restore Attachment

ⓘ By clicking this "Restore" button you will reactivate this attachment. This means that this attachment will now be considered active where it (1) will return to its original placement in this attachments list (based on the date that it was originally uploaded), and (2) will be displayed elsewhere in SMIS, where applicable.

[Confirm] [Cancel]

- ✓ If Confirm button is selected, this attachment will be reactivated. This attachment will now be considered active where it (1) will return to its original placement in this attachments list (based on the date that it was originally uploaded), and (2) will be displayed elsewhere in SMIS, where applicable.
- ✓ If Cancel button is selected, the window will close, and the attachment will remain archived.

Important Notes:

1. Once an Attachment record is created it will be displayed elsewhere (Intake/Identification on record) in SMIS, where applicable.