

Client Attachment Edit Screen

Updated on October 2023

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Business Purpose:

The **Attachment Edit** page allows the user to upload attachments to SMIS sorted into different Document Type for a particular Client.

How to:

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

Client Information

Client No: 729650 Client Name: One, Test Age: 27 DOB : 1996/09/09

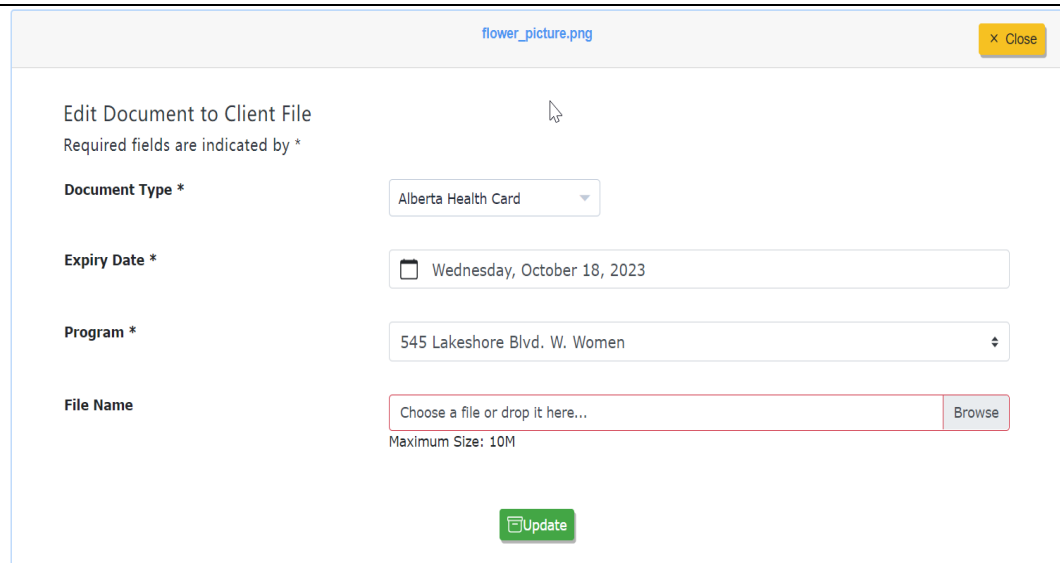
Documents in Client File < Back to Client Search New Document View History log

Search Document List Show 12 Rows Total Count 7

Please Note: If an attachment has a "Last Updated" date that is March 15, 2022 or earlier, that attachment has not been converted to the new attachment format. This means that "Other" was automatically selected for the "Document Type" field using information from the old "Document Category" field. You can change this information at any time by (1) clicking "Edit" and then (2) selecting a "Document Type" that is more applicable for that attachment.

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

- a. Click on **Edit** button – **Edit Document to Client File** page will open with the ability to change/replace the client **Document type**, **Program**, **Expiry Date** *, **File Name** (another attached document).



flower_picture.png Close

Edit Document to Client File

Required fields are indicated by *


Document Type *

Expiry Date *

Program *

File Name

Maximum Size: 10M

- **Document type *** – if you want to change document type click on document type dropdown list and select one of the options.
- **Program *** - if you want to change program click on program dropdown list
- **Expiry Date *** - if you want to change expiration date click on the calendar icon and select a date. 
- **File Name*** - if you want to change the attachment:
 - a) Click on the [Browse](#)
 - b) Select a document file
 - c) Click on the [Open](#) button
- Click on the [Update](#) green button, and then [Close](#) client file editing mode. The document record should be updated and saved.

Important Notes:

1. The maximum size of each attachment is 2 megabytes.
2. The availability of the **Expiry Date *** field depends on the selected **Document type**.