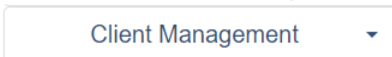
HIPSK

HT22: HOW TO UPLOAD CASE SESSION DOCUMENTS

Session documents may only be recorded by the primary case worker assigned to support the client.

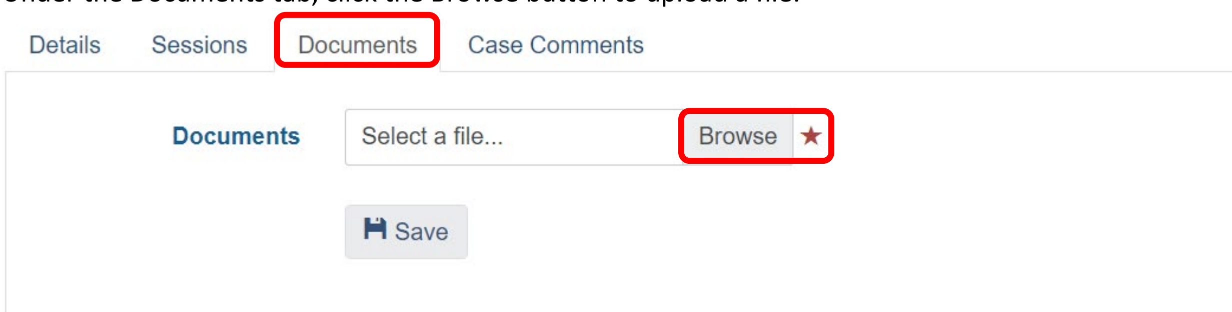
1. Search for the client and click on their name to enter their file. If serving a family, navigate to the Family Head's file.

2. Click on the Client Management drop-down menu and select Case Management.



3. For the Open record, select Display under the Action column.

4. Under the Documents tab, click the Browse button to upload a file:



5. Select the file(s) you want to upload and click Open. You may multi-select files for a maximum of 5 MB per upload. Not all file types are permitted (e.g. pptx).

6. Click the Save button.

You should only upload documents to HIFIS that help clients navigate the system of supports. Two types of documents that should NOT be uploaded to HIFIS include:

- Health records
- Social Insurance Number