NAZ Connect Procedure

**Manage Documents**

- Upload a Document
- Open an Uploaded Document

**Upload a Document**

1. Search for and open the person’s record.
2. Under Menu, go to Youth/Family Profile -> Setup Info.
3. On the Setup Info tab, Click on Manage Client Documents.
4. On the **Document Management** window, click **Upload**.

5. On the **Document Uploader** window, select the **Security** level for this document (note that Private locks the document down to the current Provider, NOT individual user).

6. Select the **Document Type**.

7. Choose the **Category** to which this document applies.

8. Click **Choose File** to select the file from a drive.

9. Hit **Submit**.

10. The document should now appear on the **Document Management** window, as shown below.

11. Click **Return** to go back to the person’s record.

**Open an Uploaded Document** *(return to top)*

1. On the Setup Info tab, Click on **Manage Client Documents**.

2. Click **View** to download the document.