

Counseling Documents - Start here

Last Modified on 09/28/2026 11:48 am CDT

The [Counseling Documents](#) tool stores supplemental documentation related to a person's record.

Getting started

- [Counseling Documents video](#)

How-to guides

- [Create a new document](#)
- [Upload a document](#)
 - [View and edit uploaded documents](#)
- [Lock or unlock a document](#)
- [Publish or remove draft from Portal](#)
- [Copy documents](#)
- [Amend a document](#)
- [Delete a document](#)
- [Print a document](#)

Custom Forms

- [Manage custom forms](#)

Reference

- [Document list](#)
- [Document warnings](#)
 - [Warning logic](#)
- [Document fields in Ad hoc](#)

Administrator setup

- [Counseling Tool Rights](#)