

Adding a New Client

1) Search for the client, to *make sure* they are not already in the system.

(See "**Searching for a Client**" for instructions.)

The screenshot shows the 'Access or Create Client Record' window. At the top, there is a search bar with the instruction: "[Search [One of More Search Fields must be entered to display Clients in "All Clients" mode.]". Below this are input fields for Last Name (BRO), First Name (RO), Middle Name, and Date of Birth (//). There are also fields for Social Security Number, Local Case Number, and Drivers License. A 'Search' button is located to the right of these fields. Below the search fields is a 'Client List' table with columns for Name and Date of Birth. The table contains several rows of client data. At the bottom of the window, there is a toolbar with various icons and buttons. The 'Add' button is circled in red.

2) If the client cannot be found in the system, click the **Add** button.

The screenshot shows the 'Client Entry Wizard' window. It prompts the user to "Enter at least one of the below:". There are two main options: "Social Security Number: 345-98-4567 (All 0's or 9's for no SSN)" and "OR / AND Drivers License Number:". The Social Security Number field is circled in red. Below this, there is a section for "Additional information:" with fields for "Date of Birth: 07/25/1988" and "City of Birth: Cincinnati". Both the Date of Birth and City of Birth fields are circled in red. At the bottom of the wizard, there are three buttons: "Previous", "Next", and "Cancel". The "Next" button is circled in red.

3) Enter the client's
Social Security Number
Date of Birth
City of Birth
then click **Next**.

Access or Create Client Record

[Search [One of More Search Fields must be entered to display Clients in "All Clients" mode.]

Last Name: BRO First Name: RO Middle Name: Date of Birth: / /

Note: SSN Entry Overrides Name Search Parameters
 Social Security Number: Local Case Number: Drivers License: Search

Client Entry Wizard

Please Enter both of the following:

First Name: Robert

AND

Last Name: Browning

Previous Next Cancel

4) Enter the client's
 First Name
 Last Name
 then click **Next**.

Client Management

File Edit Tools Applets Windows Help

Client Management

Robert Browning
 SSN: 345-98-4567
 Date of Birth: 07/25/1968

TaskView

Selected View: Task Flow: TRH Housing Case Manage

Order: Task:
 01 Common Intake
 02 Case Record Forms [formerly QuickForms]
 03 Income Sources
 04 Meetings
 05 Placement
 06 CS: TRH Intake 2

Last Name: Browning First Name: Robert Middle Name: Status: No Status Date: 06/17/2007

Date of Birth: 07/25/1968 Last Visit: File ID: ID Cards: Social Security Number: 345 98 4567

Maiden Name: Alias Name: Mother's Maiden Name: Name Changed: Birth Place: Note: Wait List: Local Only: Active Alert

Current Addresses and Phone List

Label: Phone: Address: City:

Auxiliary Screens Show Active Delete Edit Add

Further Information

Gender: Employment Status: Marital Status: Unique Client ID Data
 Disability/Spec Needs: Citizenship: Parental Status: Detailed Client Data
 Income Level: Primary Race: Young/Oldest Child's Age: Family/Group Links
 Education: Native Language: Number of Children/Dependents: Assigned Staff

The **Common Intake** screen will appear, ready to enter more client information.