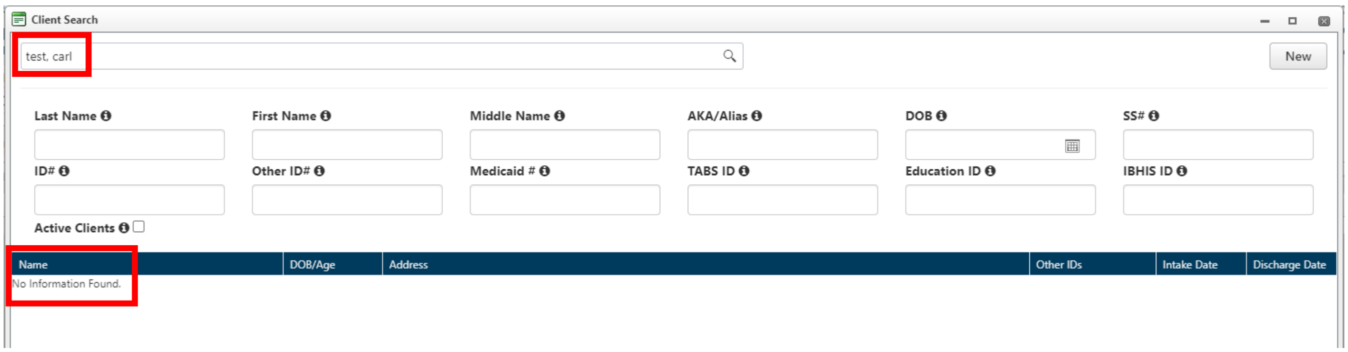
Enrolling a New Client

Video Guidance:

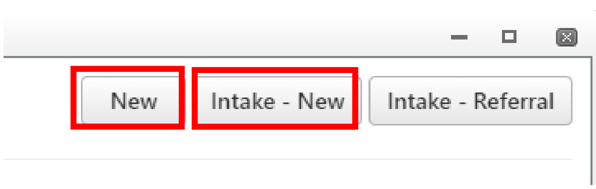
[Enrolling a New Client Part 1] [Enrolling a New Client Part 2]

Breadcrumbs: Client > Client Information > Personal Information > Demographics

- Starting on the demographics page is a good place so additional demographic information can be entered that was not collected on intake form.
- Before you enroll a new client, search their name in the system first to make sure they do not already have a client record.

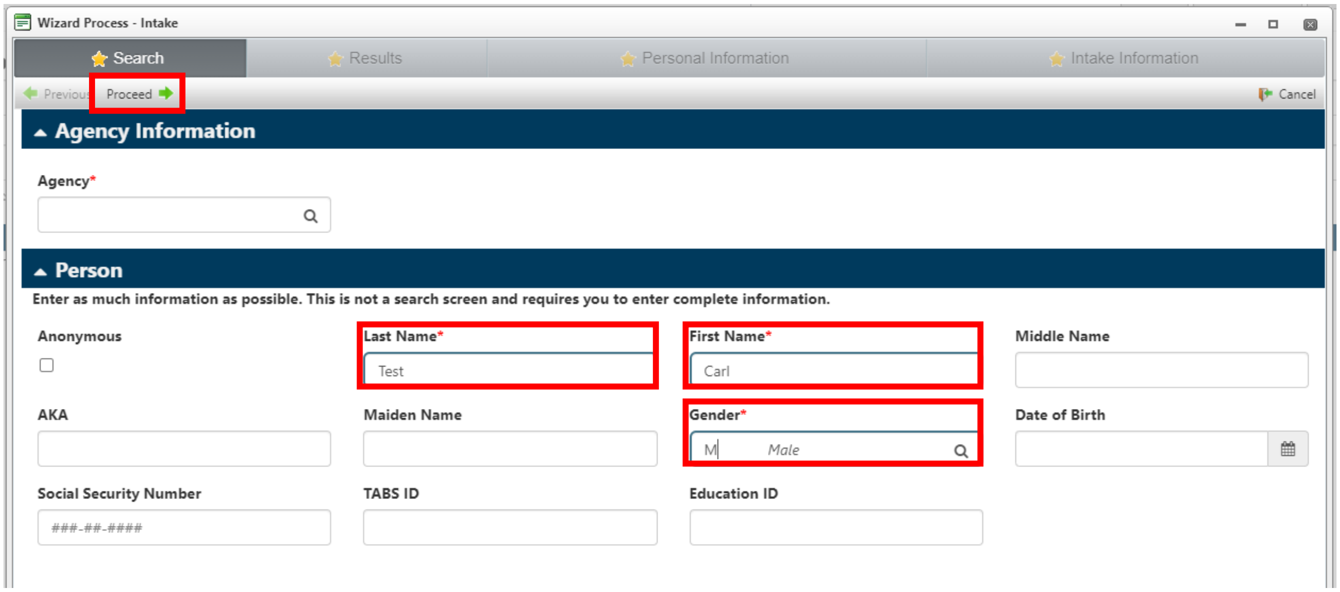


Click New > Intake New



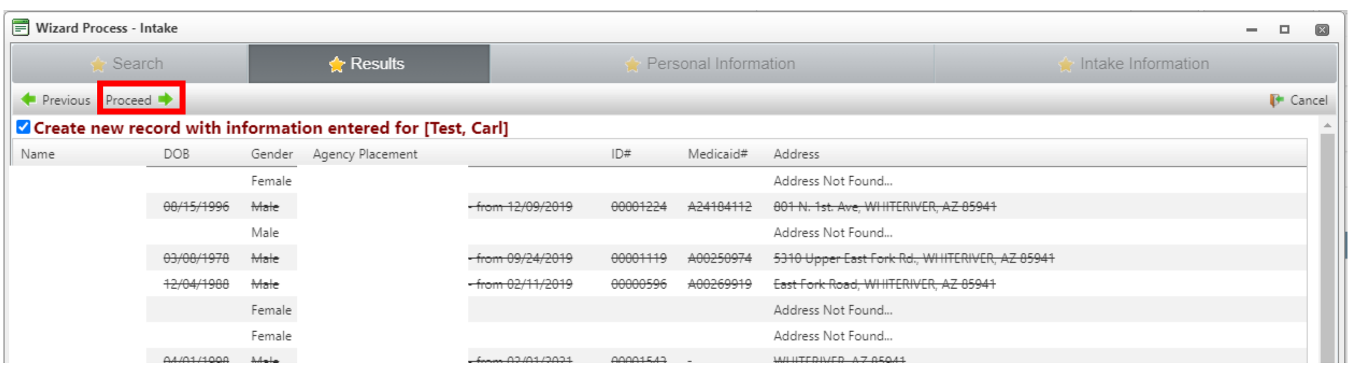
Intake Wizard - Search

- Complete Last Name, First Name, Gender fields
- Click Proceed



Intake Wizard – Results

- If a name is listed with a line through it, this means there is a close match already in the system. Double check that the new client's name is not listed.
- If they are not listed, click Create new record with information entered for [client name].

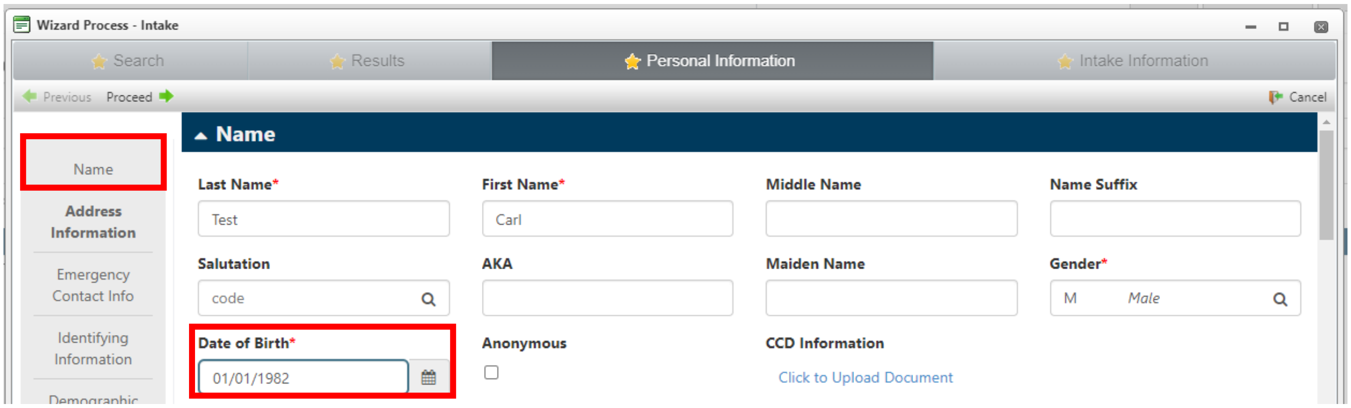


**Names have been hidden for client privacy.*

Intake Wizard – Personal Information

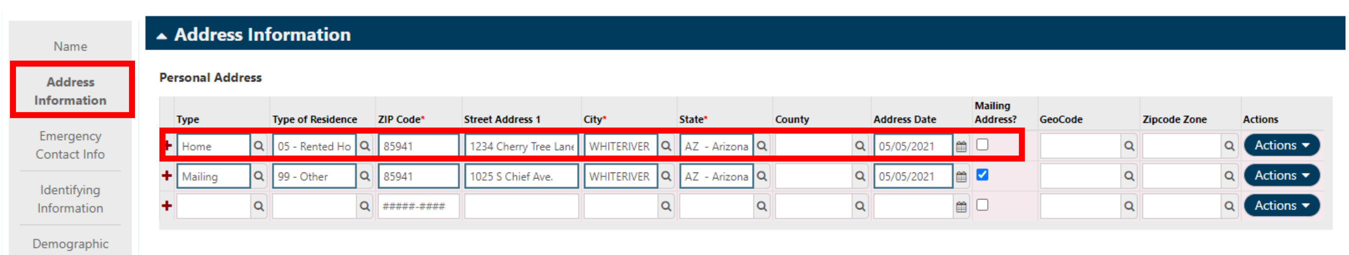
Name

- Last Name, First Name, Gender will be completed from search criteria.
- **Date of Birth**: This field must be completed to complete Intake process.
  - *TIP: If DOB is unknown, enter 1.1.1900. Be sure to go back and edit once DOB is known.*



Address Information

- **Type**: Use magnifying glass to make selection
- **Type of Residence**: Use magnifying glass to make selection; Leave blank if unknown
- **Zip Code**: Entering Zip Code will complete City, State, County fields.
- **Street Address**: Complete and double check to ensure information collected is correct
- **Address Date**: Enter the date address is collected.
- **Mailing Address?**: Check this box if address can be used for mailing purposes.
    - Two Addresses can be entered if a client's mailing and home addresses differ.
- End Date: This field can be completed in the future if address is no longer valid.
- Comments regarding address can be added by in the Directions/Remarks field by clicking Actions > Open Form.



Emergency Contact Info

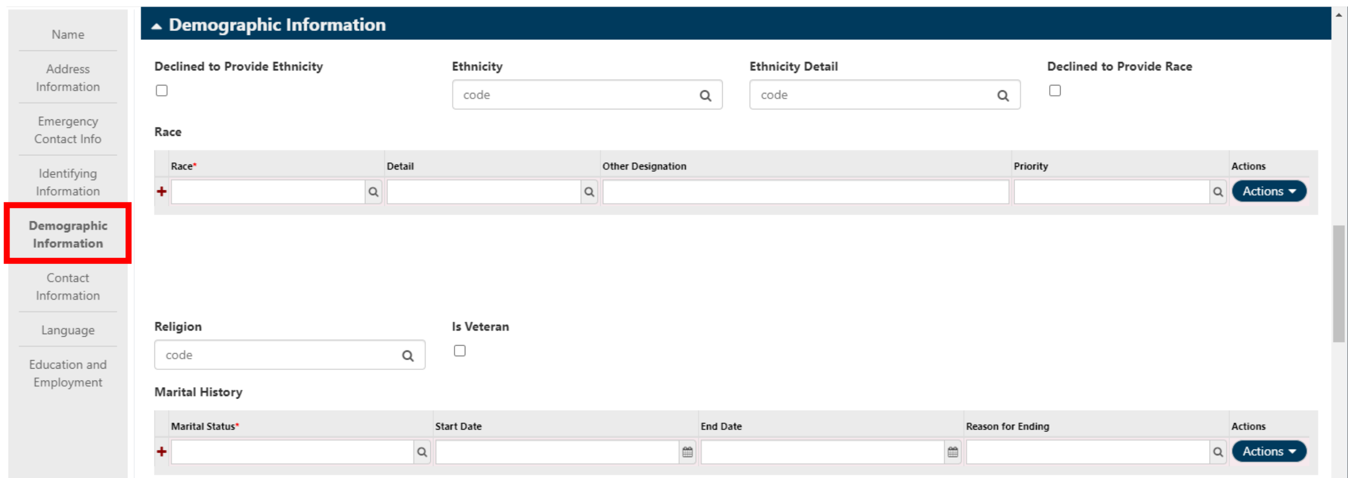
- This information is not entered during enrollment.
- Emergency Contacts can be entered as collaterals once enrollment is complete.

Identifying Information

- Social Security Number: Complete this field if information is available.

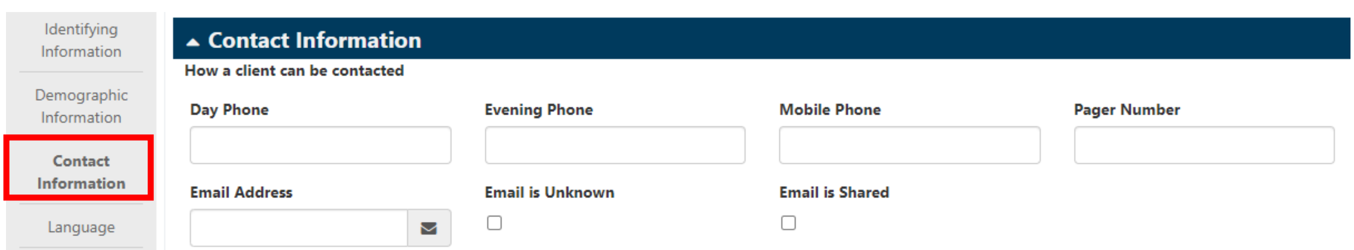
Demographic Information

- These fields are not required; however, it is best to collect as much information as possible.



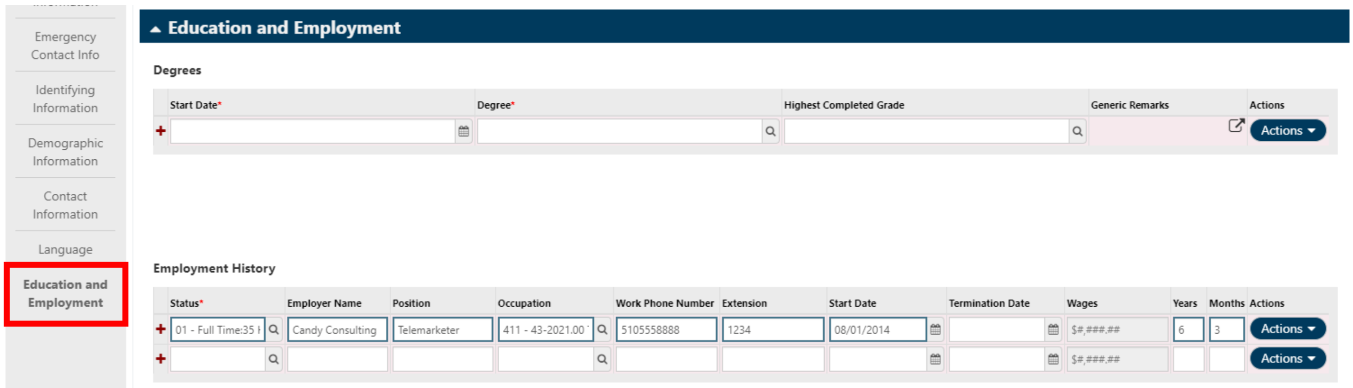
Contact Information

- Collect as much contact information as possible for client. Be sure to read back to ensure that you have entered accurate information



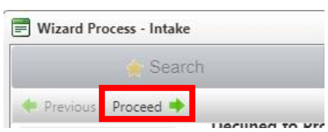
Education and Employment

- Complete Degrees and Employment history if applicable.



Family Information section is not used at this time.

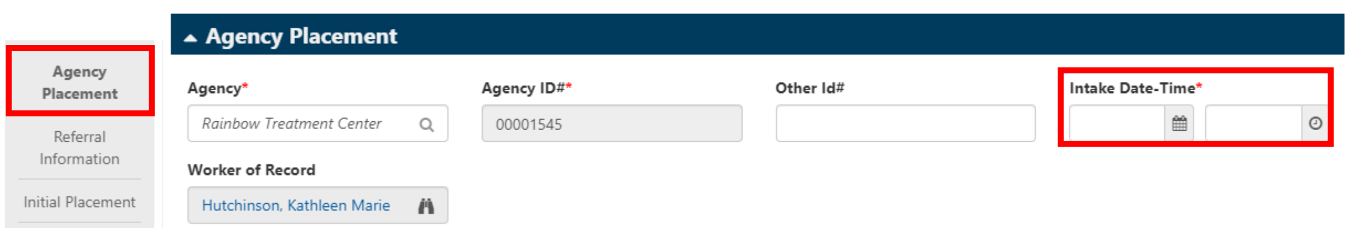
Click Proceed at the top of the Intake Wizard screen



Intake Wizard – Intake Information

Agency Placement

- **Agency/Agency ID**: These fields will automatically populate and cannot be changed
- **Other Id**: This field will not be used at this time
- **Intake Date-Time**: Use calendar/clock icons to complete fields
- Worker of Record: This field will automatically populate. Use binoculars to edit as necessary.



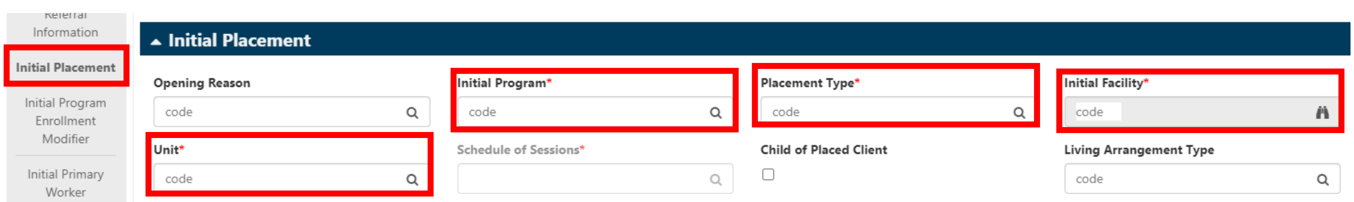
Referral Information

- **Managing Office Responsible**: This field will automatically fill and cannot be changed
- **Referral Source**: Use binoculars to make selection; Select Self if not sure

- **Primary Reason for Referral**: Use magnifying glass to make selection
- **Initial Contact Method**: Use magnifying glass to make selection

Initial Placement

- **Initial Program**: Use magnifying glass to make selection
- **Placement Type**: Use magnifying glass to make selection
- **Initial Facility**: Use binoculars to make selection
- **Unit**: Use magnifying glass to make appropriate selection (Select NA if unsure.)
- Complete other fields as trained by supervisor

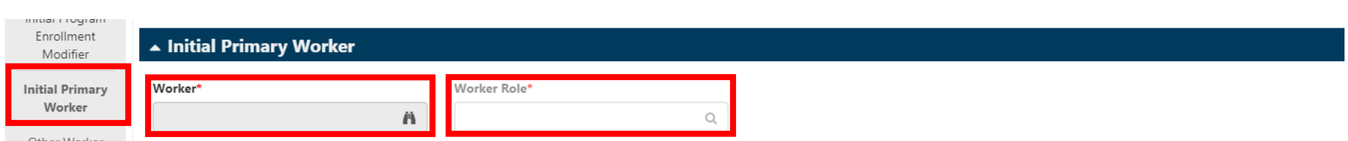


Initial Program Enrollment Modifier

- Program Modifiers are not used at this time.

Initial Primary Worker

- Worker: Use binoculars to make selection
- Worker Role: Use magnifying glass to make selection

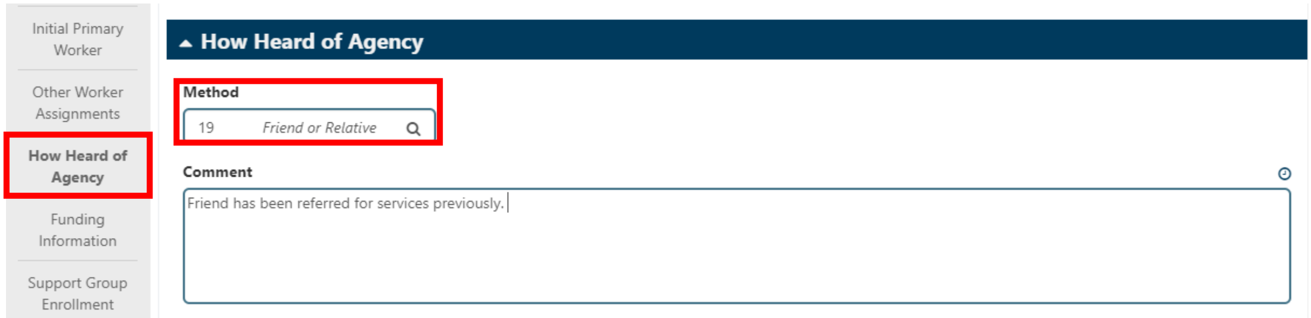


Other Worker Assignments

- These can be added after client is enrolled.

How Heard of Agency

- Method: Use magnifying glass to make selection
- Comment: Use this field to include any additional information



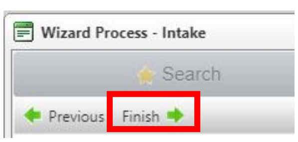
Funding Information

- This information will be entered later once verified by Intake staff.

Support Group Enrollment

- These groups will not be assigned during Intake.

Click Finish



Client is now be enrolled in agency and Demographic page will be open.

Scroll through to add additional information regarding contact preferences, special communication needs, etc.