

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.

Client Search

test, carl

New

Last Name ⓘ First Name ⓘ Middle Name ⓘ AKA/Alias ⓘ DOB ⓘ SS# ⓘ

ID# ⓘ Other ID# ⓘ Medicaid # ⓘ TABS ID ⓘ Education ID ⓘ IBHIS ID ⓘ

Active Clients ⓘ ☐

Name	DOB/Age	Address	Other IDs	Intake Date	Discharge Date
No Information Found.					

Click New > Intake New

New Intake - New Intake - Referral

Intake Wizard - Search

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

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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]**.

Name	DOB	Gender	Agency Placement	ID#	Medicaid#	Address
		Female				
	08/15/1996	Male	-from 12/09/2019	00001224	A24104112	001 N. 1st Ave, WHITERIVER, AZ 85941
		Male				Address Not Found...
	03/06/1978	Male	-from 09/24/2019	00001119	A00250974	5310 Upper East Fork Rd., WHITERIVER, AZ 85941
	12/04/1988	Male	-from 02/11/2019	00000506	A00269919	East Fork Road, WHITERIVER, AZ 85941
		Female				Address Not Found...
		Female				Address Not Found...
	04/01/1998	Male	-from 02/01/2021	00001543		WHITERIVER, AZ 85941

**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.*

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Wizard Process - Intake

Search Results Personal Information Intake Information

Previous Proceed Cancel

Name

Last Name* First Name* Middle Name Name Suffix

Test Carl

Salutation AKA Maiden Name Gender*

code

Date of Birth* Anonymous

01/01/1982

Click to Upload Document

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.

Address Information

Personal Address

Type	Type of Residence	ZIP Code*	Street Address 1	City*	State*	County	Address Date	Mailing Address?	GeoCode	Zipcode Zone	Actions
Home	05 - Rented Ho	85941	1234 Cherry Tree Lane	WHITERIVER	AZ - Arizona		05/05/2021				Actions
Mailing	99 - Other	85941	1025 S Chief Ave.	WHITERIVER	AZ - Arizona		05/05/2021				Actions
		#####									Actions

Emergency Contact Info

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

Identifying Information

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

The screenshot shows the 'Identifying Information' section of the client enrollment form. The left sidebar has a red box around 'Identifying Information'. The main section has a dark blue header 'Identifying Information'. Below it, there are three input fields: 'Social Security Number' (with a red box around it and a placeholder '###-##-####'), 'TABS ID', and 'Education ID'.

Demographic Information

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

The screenshot shows the 'Demographic Information' section of the client enrollment form. The left sidebar has a red box around 'Demographic Information'. The main section has a dark blue header 'Demographic Information'. Below it, there are several sections: 'Declined to Provide Ethnicity' (checkbox), 'Ethnicity' (code input), 'Ethnicity Detail' (code input), 'Declined to Provide Race' (checkbox), 'Race' (table with columns: Race*, Detail, Other Designation, Priority, Actions), 'Religion' (code input), 'Is Veteran' (checkbox), and 'Marital History' (table with columns: Marital Status*, Start Date, End Date, Reason for Ending, Actions).

Contact Information

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

The screenshot shows the 'Contact Information' section of the client enrollment form. The left sidebar has a red box around 'Contact Information'. The main section has a dark blue header 'Contact Information'. Below it, there is a section 'How a client can be contacted' with four input fields: 'Day Phone', 'Evening Phone', 'Mobile Phone', and 'Pager Number'. Below these are three checkboxes: 'Email Address' (with an envelope icon), 'Email is Unknown', and 'Email is Shared'.

Education and Employment

- Complete Degrees and Employment history if applicable.

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Education and Employment

Degrees

Start Date*	Degree*	Highest Completed Grade	Generic Remarks	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Actions"/>

Employment History

Status*	Employer Name	Position	Occupation	Work Phone Number	Extension	Start Date	Termination Date	Wages	Years	Months	Actions
01 - Full Time:35	Candy Consulting	Telemarketer	411 - 43-2021.00	5105558888	1234	08/01/2014		\$#,###	6	3	<input type="button" value="Actions"/>
								\$#,###			<input type="button" value="Actions"/>

Family Information section is not used at this time.

Click Proceed at the top of the Intake Wizard screen

Wizard Process - Intake

Search

Previous **Proceed** Next

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.

Agency Placement

Agency* Agency ID* Other Id#

Intake Date-Time*

Worker of Record

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

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

The screenshot shows the 'Referral Information' form. On the left sidebar, 'Referral Information' is highlighted with a red box. The main form area has a dark blue header with the title 'Referral Information'. Below the header, there are four input fields: 'Managing Office Responsible*' (containing '00001 Administration (Lic.# 00001)'), 'Referral Source*' (highlighted with a red box), 'Primary Reason for Referral*' (highlighted with a red box), and 'Initial Contact Method' (containing 'code'). Each field has a magnifying glass icon to its right.

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

The screenshot shows the 'Initial Placement' form. On the left sidebar, 'Initial Placement' is highlighted with a red box. The main form area has a dark blue header with the title 'Initial Placement'. Below the header, there are six input fields: 'Opening Reason' (containing 'code'), 'Initial Program*' (highlighted with a red box), 'Placement Type*' (highlighted with a red box), 'Initial Facility*' (highlighted with a red box), 'Unit*' (highlighted with a red box), and 'Schedule of Sessions*' (containing 'code'). Each field has a magnifying glass icon to its right. There are also two checkboxes: 'Child of Placed Client' and 'Living Arrangement Type' (containing 'code').

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

The screenshot shows the 'Initial Primary Worker' form. On the left sidebar, 'Initial Primary Worker' is highlighted with a red box. The main form area has a dark blue header with the title 'Initial Primary Worker'. Below the header, there are two input fields: 'Worker*' (highlighted with a red box) and 'Worker Role*' (highlighted with a red box). Each field has a magnifying glass icon to its right.

Other Worker Assignments

- These can be added after client is enrolled.

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How Heard of Agency

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

The screenshot shows a web form titled "How Heard of Agency". On the left is a sidebar with navigation links: "Initial Primary Worker", "Other Worker Assignments", "How Heard of Agency" (which is highlighted with a red box), "Funding Information", and "Support Group Enrollment". The main form area has a dark blue header with the title "How Heard of Agency". Below the header, there is a "Method" dropdown menu with a red box around it, showing the value "19" and the text "Friend or Relative" next to a magnifying glass icon. Below the dropdown is a "Comment" text area with a red box around it, containing the text "Friend has been referred for services previously." and a small circular icon with a plus sign in the top right corner.

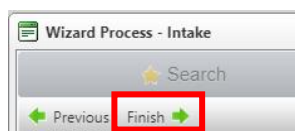
Funding Information

- 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.

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