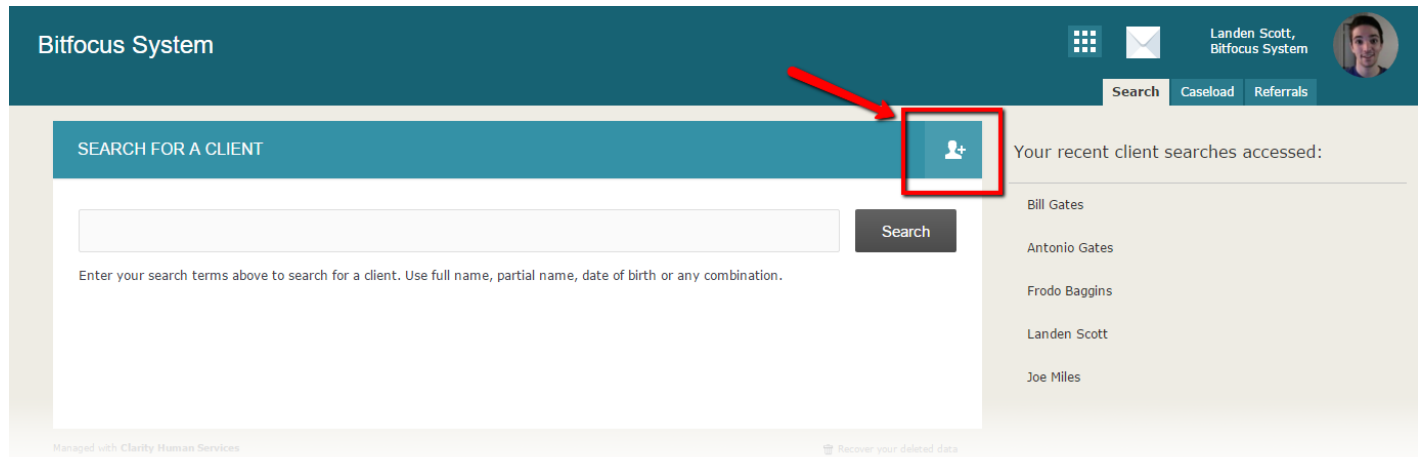


How do I create a new client?

This section discusses how to create a new Client Profile.

If, [after a thorough search](#), you have determined that your client does not exist in the system, click “Create a New Client” in the upper right corner of the Search screen.



You will be taken to the Client Profile creation page. This page will present the questions necessary to create a basic client account. Complete all necessary fields to create your client.

Core Data Fields The first fields of the Client Profile creation page are termed ‘core data fields’.

CREATE A NEW CLIENT

Social Security Number: 012 - 34 - 5678

Quality of SSN: Full SSN Reported

Last Name: Jane

First Name: Doe

Quality of Name: Full name reported

Date of Birth: 05/05/1955 Adult. Age: 60

Quality of DOB: Full DOB Reported

Middle Name: None

Gender: Female

Race: White

Ethnicity: Non-Hispanic/Non-Latino

Veteran Status: No

Please fill in Release of Information form or [Cancel](#)

RELEASE OF INFORMATION

Permission: Yes

Start Date: 12/09/2015

End Date: 12/09/2018

Documentation: Select

Be sure to complete all core fields. In the example below, the core field 'First Name' was left blank illustrating that this data element is required in order to save the client record. See 'Required vs. Soft Required vs. Not Required Fields' below for details.

Bitfocus System

Landen Scott, Bitfocus System

Search Caseload Referrals

Changes have not been saved. Please correct your entry and try again.

CREATE A NEW CLIENT

Social Security Number: 012 - 34 - 5678

Quality of SSN: Full SSN Reported

Last Name:

First Name: Doe

Quality of Name: Full name reported

Date of Birth: 05/05/1955 Adult. Age: 60

Quality of DOB: Full DOB Reported

RELEASE OF INFORMATION

Permission: Yes

Start Date: 12/09/2015

End Date: 12/09/2018

Documentation: Electronic Signature

e-Sign document - Completed

Client Aliases

Many clients have aliases, or past names. (i.e., maiden names, nicknames, etc.), which can complicate client search. The 'Alias' data field allows you to enter a list of names a client goes by. This allows other staff members and/or agencies search for the client's record using any of the names entered into the Alias data field.


When entering names, separate each name with a comma.

✓ Your changes have been saved successfully.

CLIENT PROFILE

Sample Intake

Social Security Number	XXX - XX - 5432
Quality of SSN	Full SSN Reported
Last Name	Doe
First Name	Jane
Quality of Name	Full name reported
Date of Birth	02/02/1977 Adult. Age: 38
Quality of DOB	Full DOB Reported
Unique Identifier	8922DD55B



[Update photo](#)

Alias:

or [Cancel](#)

[Log](#)

Now when a staff member searches for 'Jer', they will find the client record that includes all aliases.

Bitfocus System

Landen Scott, Bitfocus System

Search Caseload Referrals

SEARCH FOR A CLIENT

Jane Doe (jan, dear, dude)	02/02/1977	5432
----------------------------	------------	------

Your recent client searches accessed:

- Jane Doe
- Bill Gates
- Antonio Gates
- Frodo Baggins
- Landen Scott

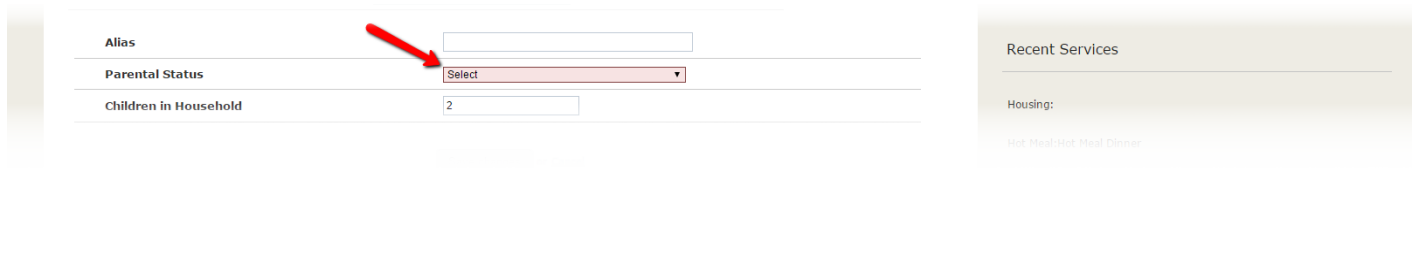
Required vs. Soft Required vs. Not Required Fields

The dynamic intake forms powered by Clarity provide many flexible features. Individual data elements can be Required, Soft Required or Not Required.

1. Required Fields

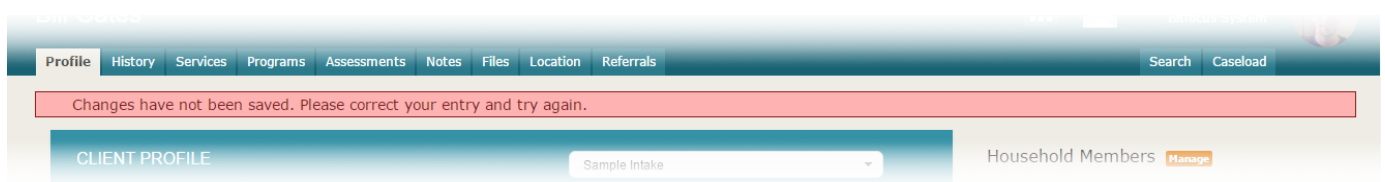
The data element must be completed, not allowing you to save the page unless a value is set. A Red banner is set across the top of the page, and the data element is outlined in Red.

In the example below, 'Parental Status' is a required field. When the user did not complete the field...



The screenshot shows a form with three fields: 'Alias' (text input), 'Parental Status' (dropdown menu), and 'Children in Household' (text input with value '2'). A red arrow points to the 'Parental Status' dropdown, which is outlined in red. A red banner at the top of the page reads 'Changes have not been saved. Please correct your entry and try again.' To the right, there is a 'Recent Services' section with a 'Housing:' label and a 'Hot Meal/Hot Meal Dinner' entry.

...a red warning bar is displayed at the top of the screen when the screen is saved....



The screenshot shows a software interface with a navigation bar at the top containing 'Profile', 'History', 'Services', 'Programs', 'Assessments', 'Notes', 'Files', 'Location', and 'Referrals'. A red banner at the top reads 'Changes have not been saved. Please correct your entry and try again.' Below the banner, there is a 'CLIENT PROFILE' section with a 'Sample Intake' dropdown menu and a 'Household Members' section with a 'Manage' button.

2. Soft Required Fields

The data element is optional, but highly recommended. The data will save and allow you to continue, but a Yellow banner will appear, as well as the field in question will be outlined in Yellow.

In the example below, the 'Children in Household' field is a 'Soft Required' field. When it was left blank, the field category turned yellow....

Quality of DOB: Full DOB Reported [Update photo](#)

Unique Identifier: DF0496175

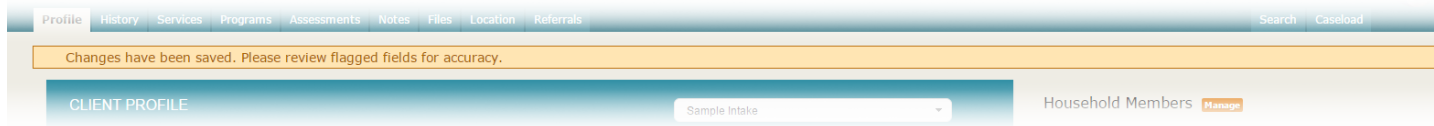
Alias:

Parental Status: Select

Children in Household:

or [Cancel](#)

...and this warning appeared at the top of the page...



3. Not Required Fields

The data element is requested as part of the form, but is completely optional for data entry. No notice is provided.

Dynamic Elements

As you complete data intake, you may be presented with dynamic data elements. For example, clicking “Yes” to Veteran Status may automatically expand the form to display additional Veteran questions, or setting your client to Female may automatically display an additional Pregnancy question. These types of example questions are completely custom to each implementation, but standard data entry rules as stated above will apply.

After completing all necessary fields, and click “Add Record” at the bottom of the page to create the client profile.