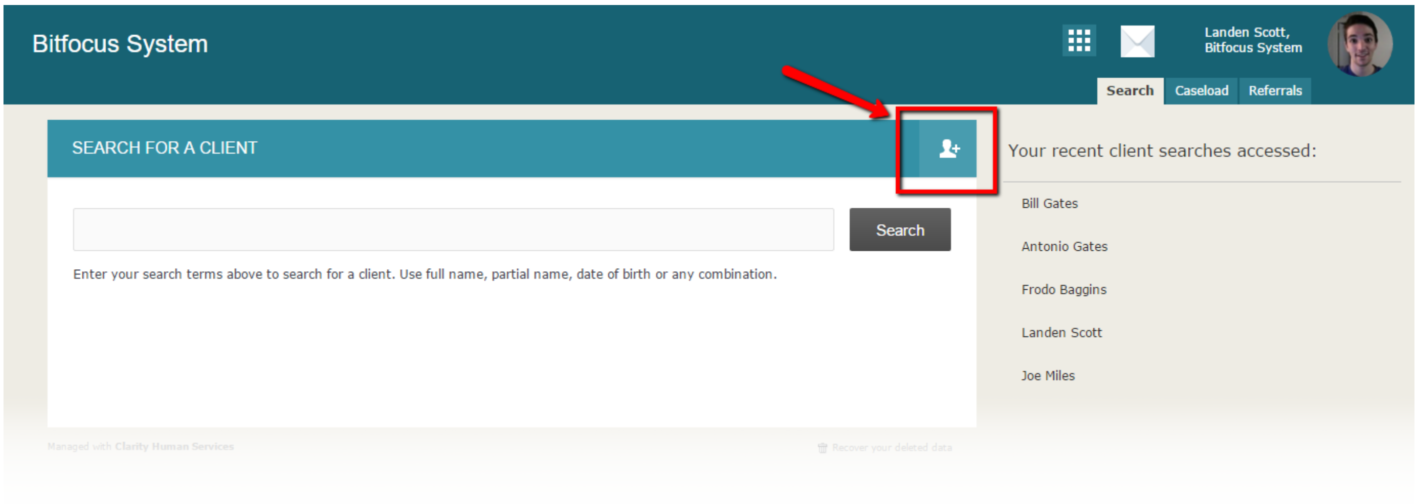
How do I create a new client?

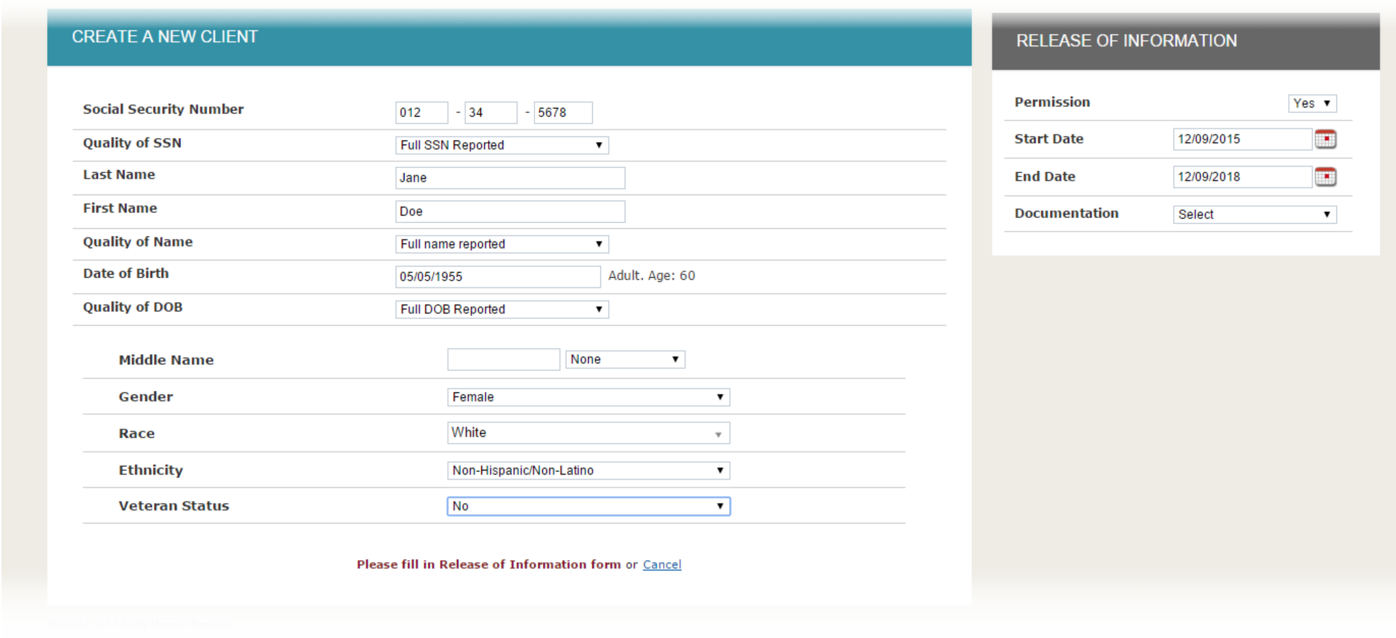
This section discusses how to create a new Client Profile.

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.

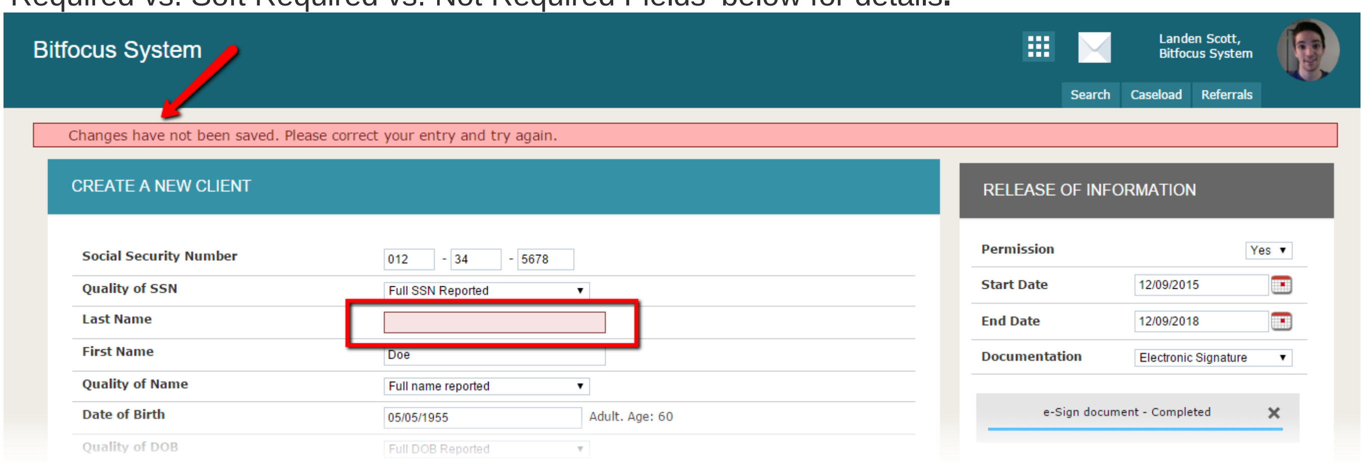


You will be taken to the Client Profile creation page. This page will present the questions necessary to create a basic client account. Complete all necessary fields to create your client.

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



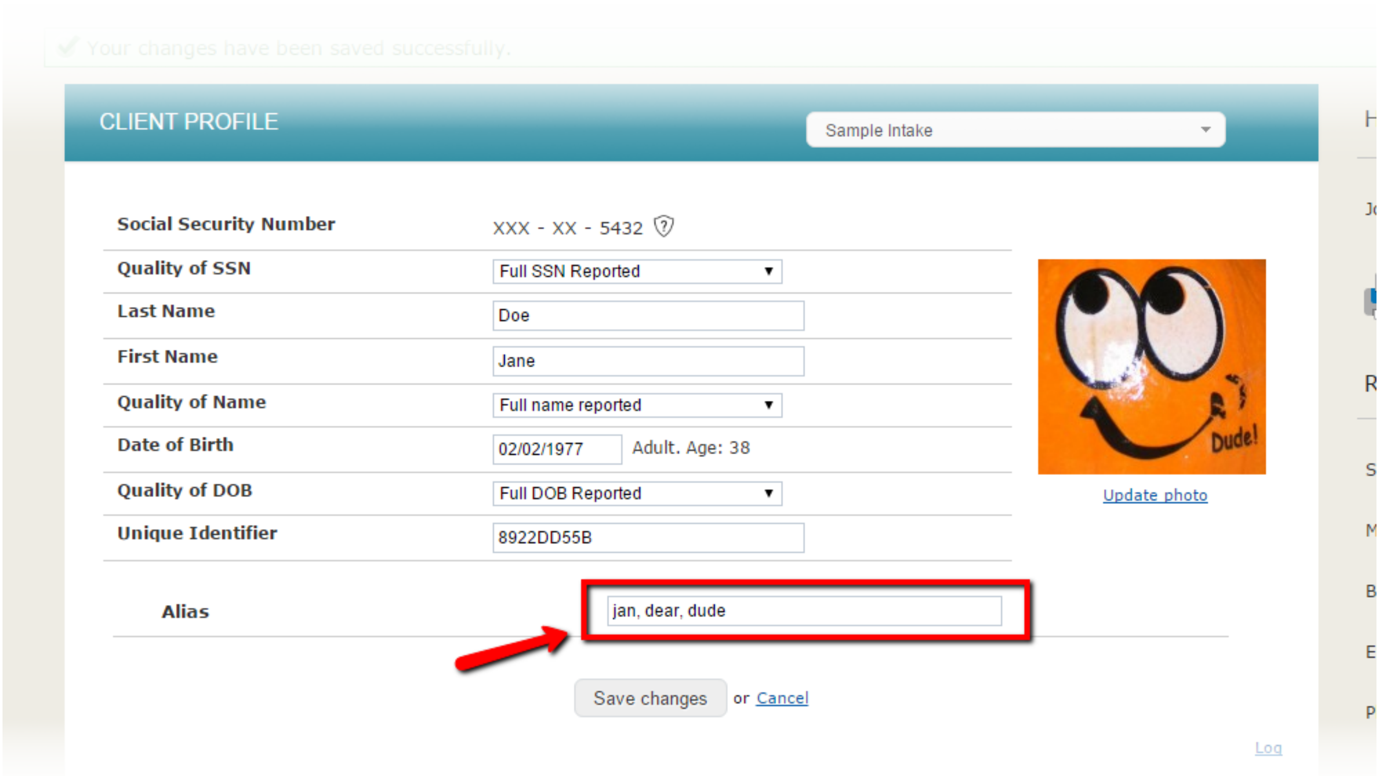
Be sure to complete all core fields. In the example below, the core field 'First Name' was left blank illustrating that this data element is required in order to save the client record. See 'Required vs. Soft Required vs. Not Required Fields' below for details.



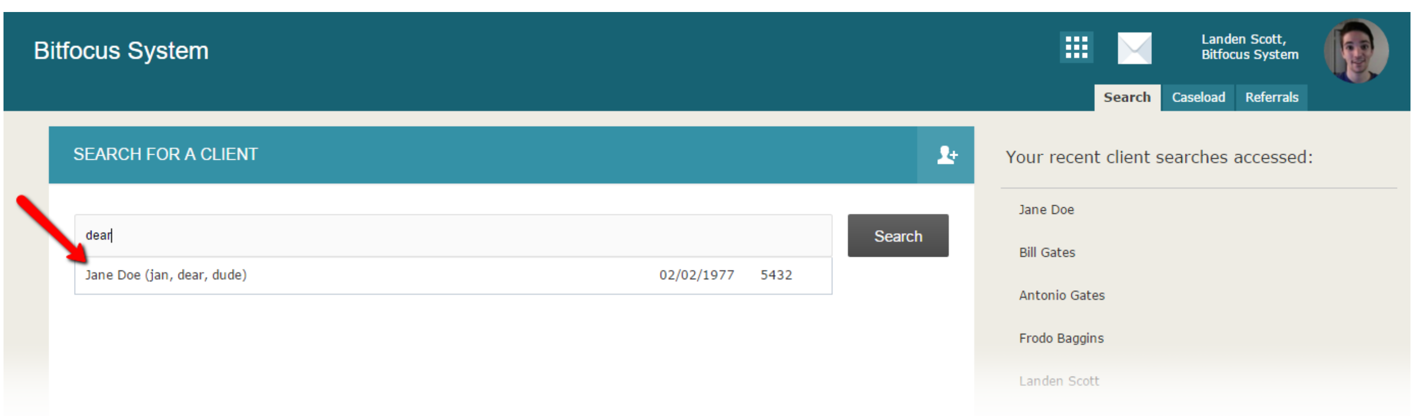
Client Aliases

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.



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



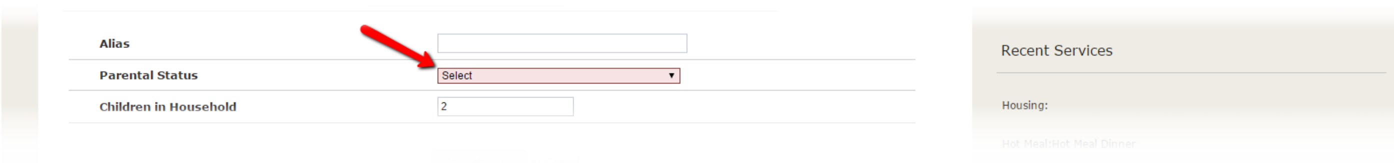
Required vs. Soft Required vs. Not Required Fields

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

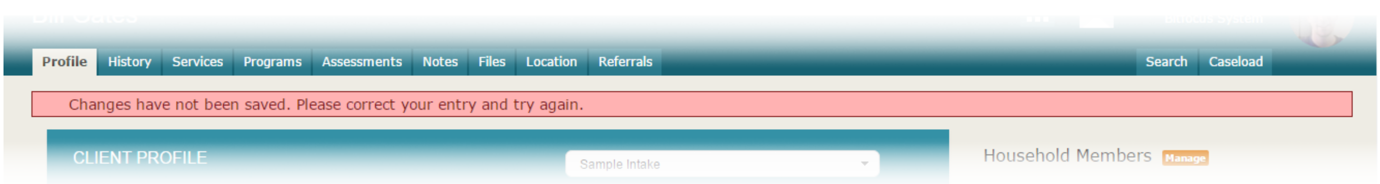
1. Required Fields

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…



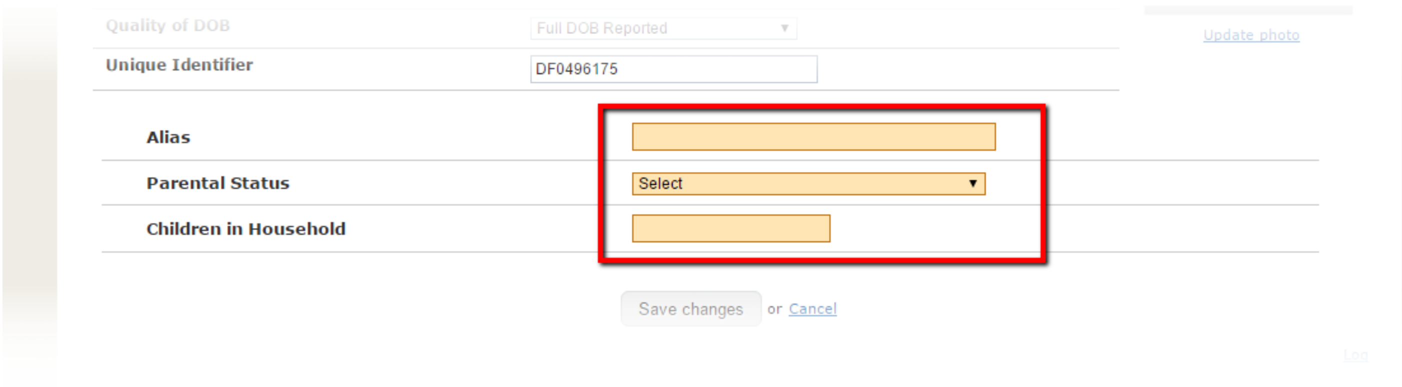
…a red warning bar is displayed at the top of the screen when the screen is saved….



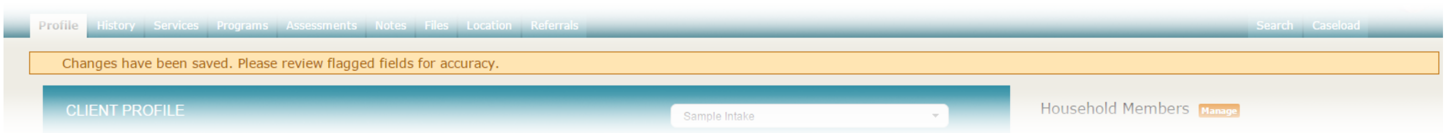
2. Soft Required Fields

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….



…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.