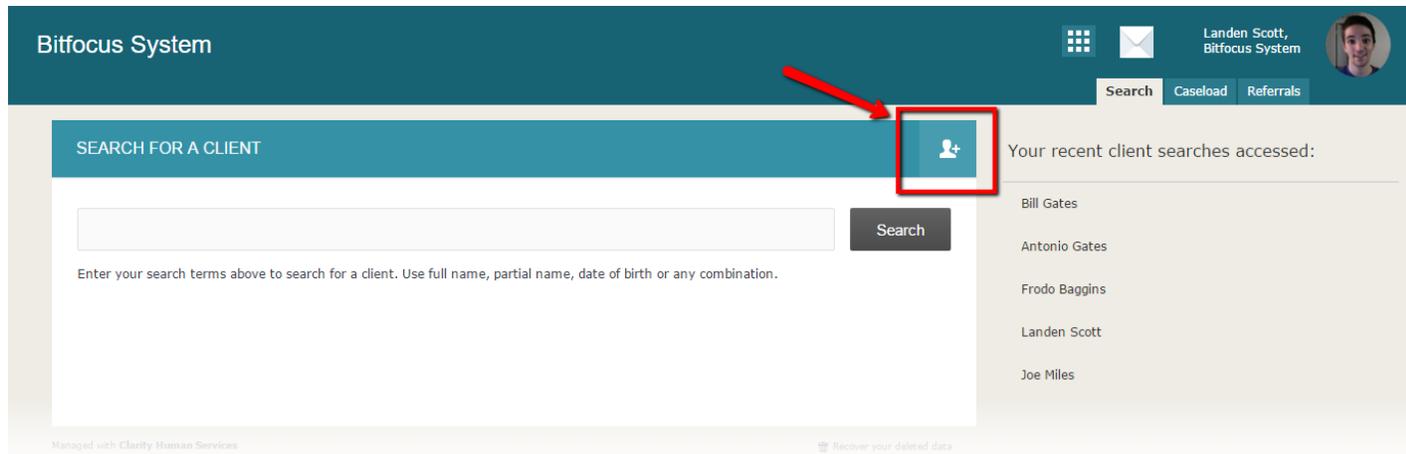


How do I create a new client?

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.

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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.

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Search Caseload Referrals

SEARCH FOR A CLIENT

Jane Doe (jan, dear, dude)	02/02/1977	5432
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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 is visible at the top of the page. 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 warning bar is displayed at the top of the main content area with the text: 'Changes have not been saved. Please correct your entry and try again.' Below the warning bar, 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

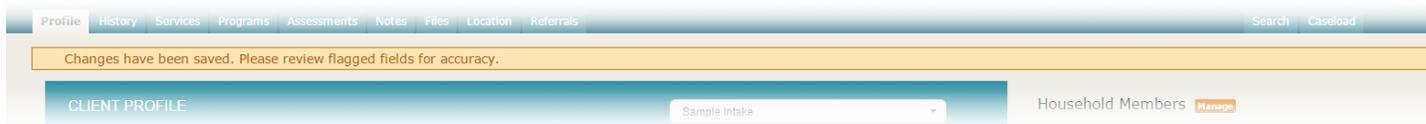
Alias:

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.