

How Do I Create a New Client Record?

If you [search for a client](#) record and determine that it does not exist in the system, click **ADD CLIENT** from the *Search* tab to create a new record.



From the **CREATE A NEW CLIENT** page, you'll record core data about the client. The fields displayed here will be based on the [Client Profile](#) assigned to the [agency](#) or staff member if [Profile Override](#) has been configured.

A screenshot of a web form titled 'CREATE A NEW CLIENT'. The form contains several input fields and dropdown menus. The fields are: 'Social Security Number' with the value '349 - 03 - 0934'; 'Quality of SSN' with a dropdown menu showing 'Full SSN Reported'; 'Last Name' with the value 'Doe' and a calendar icon; 'First Name' with the value 'Jane'; 'Quality of Name' with a dropdown menu showing 'Full name reported'; 'Quality of DOB' with a dropdown menu showing 'Full DOB Reported'; and 'Date of Birth' with the value '12/20/1968' and a calculated field 'Adult. Age: 48'.

Certain fields are required before you can save the record. If a required field is left blank, a banner will display to indicate that the record cannot be saved.

 Please correct errors.

CREATE A NEW CLIENT

Social Security Number

____ - ____ - ____

Note: To assist with data entry, if you enter 000-00-0000 for the Social Security Number field value, the Quality of SSN field will auto-populate with "Client doesn't know." You can update this value as needed. Similarly, since the HUD Data Standards only require users to enter a value for the Date of Birth field when certain Quality of DOB field selections are made, the Quality of DOB field is listed first; the selection you make for the Quality of DOB field will then determine whether the Date of Birth field remains on the screen:

- If you select "Full DOB Reported" or "Approximate or partial DOB reported," the Date of Birth field remains on the screen for you to complete.
- If you select "Client doesn't know," "Client refused," or "Data not collected," the Date of Birth field will disappear from the screen.


If the assigned *Client Profile* is customized locally, it may also contain fields that aren't required.

After completing all necessary fields, click **ADD RECORD** at the bottom of the page to create the client record.

The client's Unique Identifier will be displayed on the right side of the screen. Users with the *Client General ID Access Right* toggled on can hover over this icon to display a tooltip with the client's General ID (used for identifying duplicate client records within Clarity Human Services), even if the General ID matches the Unique Identifier.

CLIENT PROFILE

Social Security Number	XXX - XX - 1111
Quality of SSN	Full SSN Reported
Last Name	Test
First Name	Tom
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	01/01/2000

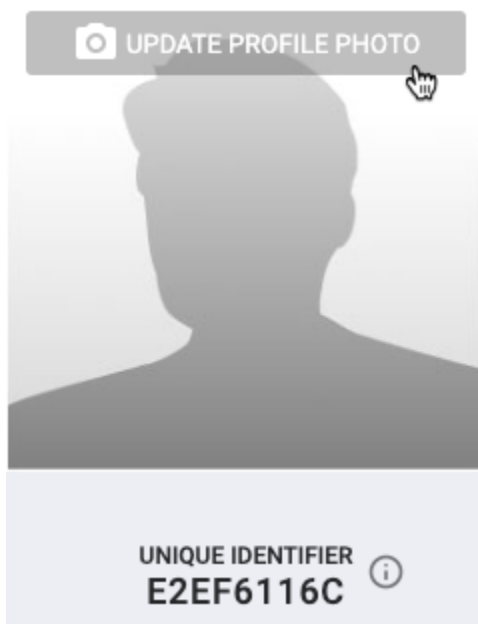


UNIQUE IDENTIFIER
E2EF6116C

General ID: 15007

Adding a Photo

To add a client photo to the client record, hover over the default Client Profile image and click *UPDATE PROFILE PHOTO*.



If you are taking a photo using a webcam, you may need to grant access for the site to access your camera in your browser.

If you're uploading a file, the allowable file formats are .gif, .jpg, .jpeg, .png, and .tiff and the maximum file size is 4MB.