Creating a Client

In order to reduce duplication, a Desktop Search must be performed to verify the individual isn't already in the system.

If the results contain a contact that matches the individual, the connections for the contact can be selected to evaluate the individual for possible conflicts. If no conflicts exist, the contact can be selected as the Client.

If no contact exists that matches the individual in the search results, Create New Client is selectable from the Actions dropdown menu.

Client information is then entered with the only required information being the first and last name of the client.

When entering the birthdate, the age can used to estimate a birthdate. Age is not necessary if the birthdate is known.

Contacts are searched for to verify the individual is not already in the system. After searching, the results will display an option to Select the Client, Create a New Contact or skip the contact.

Required information left as the default value ("Not Selected" if so configured in the Administration) will generate a warning displayed in the Client View.

Required information items are: Gender, Location, Living Arrangement, Disability, Birthdate, and Ethnicity.