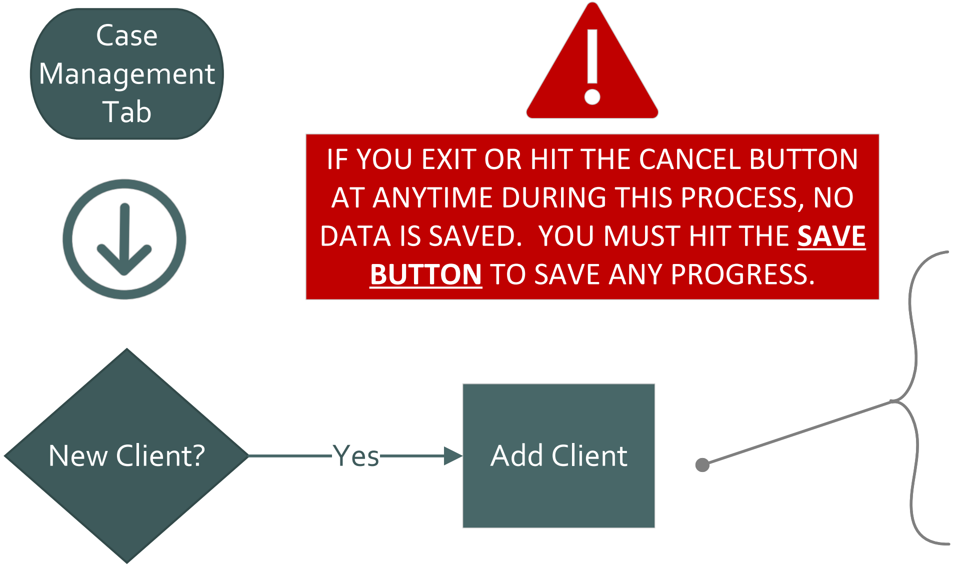
How to Add a New Client



IF YOU EXIT OR HIT THE CANCEL BUTTON AT ANYTIME DURING THIS PROCESS, NO DATA IS SAVED. YOU MUST HIT THE **SAVE BUTTON** TO SAVE ANY PROGRESS.

This enters into a workflow that includes demographics, family members, enrollment and assessment

1. Enter Last Name, First Name, AKA
2. Enter Gender, Preferred Pronouns
3. Enter DOB

All fields are required except *Preferred Pronouns* and *AKA*.

4 Choose Marital Status

5 Choose Race (Multiple Races can be selected)

6 Choose Ethnicity

7 Choose Country of Origin

8 Choose Citizenship

All fields are very important for reporting demographics.

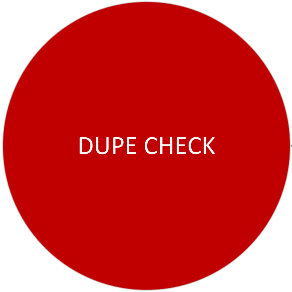
If Ethnicity is not listed, choose **OTHER** and enter ethnicity in the box that appears to the right.

9 Select Preferred Language

10 Select Language Spoken at Home

11 Select Veteran Status (only appears if client is 18 or older)

If this is an **existing client and you are changing their name, check the Name Change Box.** Then select the Old Name Begin and End Dates. THIS SHOULD NOT BE CHECKED ON AN INCOMING CLIENT



Review Duplicate Check Results Carefully.

Choose the appropriate client or select **This is a New Client**. If you are unsure if this is a duplicate, continue as if this is a new client and inform the Data Team of the client name so that they can merge clients if necessary.