#Adding a new client

When you add a new client in CW you automatically enter into a workflow. This means that there are predefined steps that are required in order to complete the process. For a new client these steps are: client demographics, family members, enrollment, assessment and services.

To start this process, you want to go to the **Case Management** tab, and choose **Add Client** from the left menu.
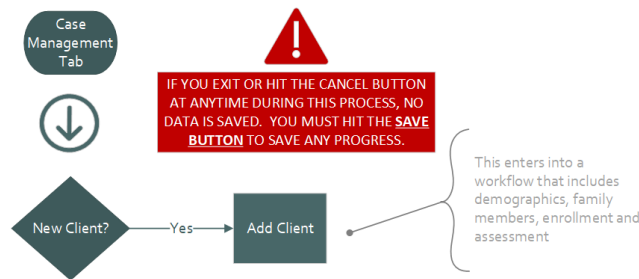

Figure 1: New Client

##Client Demographics

Once you have selected **Add Client**, you have entered into the New Client Workflow. The first step to this process is to fill in the client demographic. Start by filling out the first and last name, selecting a gender and entering in a birth date.
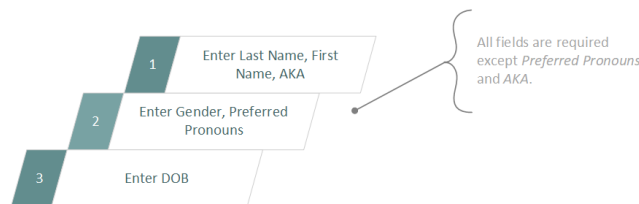

Figure 2: First Steps

*TIP When entering in the date of birth, there is a drop down box that lets you choose different options. You can enter in the full DOB, a partial one or you can enter in just an age. You may also select "Client prefers not to answer", BUT only use this option if the client is uncomfortable. The age is a necessary piece of data for reporting.

Continue filling out the demographics. Again, much of this data is extremely important for reporting. Please be as thorough as possible. Just because a box is not marked as required (a little red star) doesn't mean the information is not important for reporting and to help you and other case managers provide the client with the most appropriate help and options.

4 Choose Marital Status

All fields are very important for reporting demographics.

5 Choose Race (Multiple Races can be selected)

6 Choose Ethnicity

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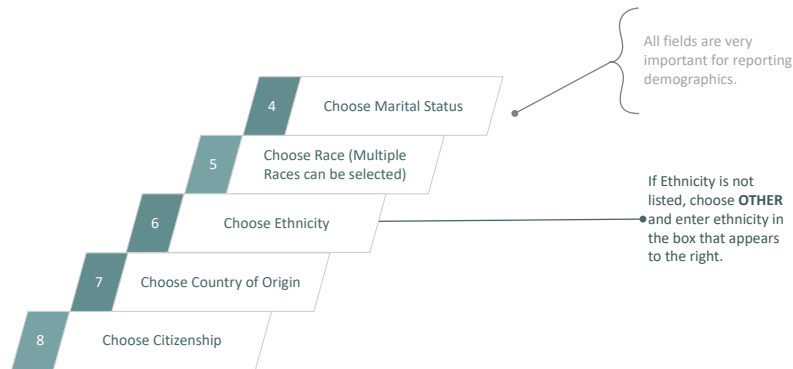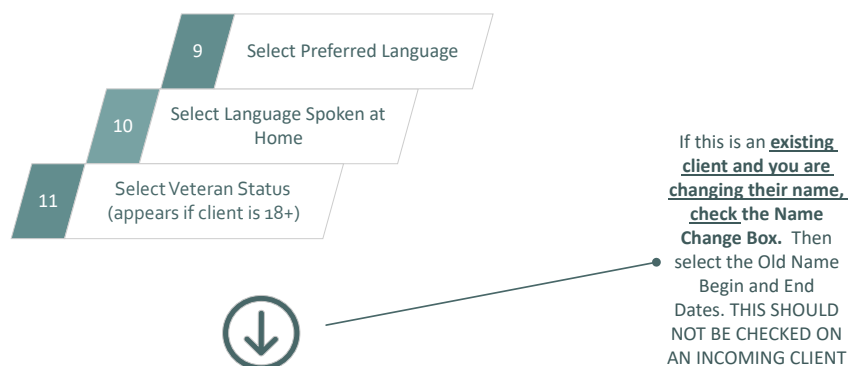
7 Choose Country of Origin

8 Choose Citizenship

Figure 3: Second Steps

For example - Citizenship is not a required field, but with this knowledge you can point the client towards the steps to become a citizen or towards legal counsel.

Work through the remaining questions. If your client is 18 years or older, a question regarding veteran status will also appear

9 Select Preferred Language

10 Select Language Spoken at Home

11 Select Veteran Status (appears if client is 18+)

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

{width = 60% .center}

Now that the entire page has been filled out, you **must** check for duplicate clients. This is an important step for not only data integrity, but also for you to know if the client has been to CCAOH before. Review this information carefully and contact the Data Team if you suspect duplicate accounts.

DUPE CHECK

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.
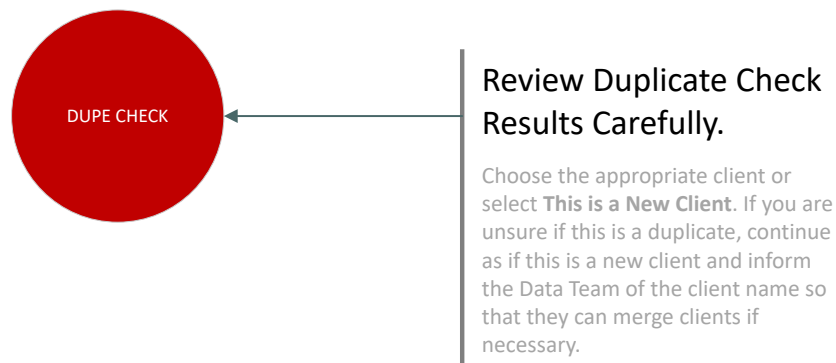
Figure 4: fourth steps

Hit **Next** at the bottom of the page and finish off the client demographics by entering in the client's address and contact information.

On the Address tab you have a choice. You can choose to use the Google Lookup field or you can enter in the information below. If you choose the Google Lookup field, as you type you will be shown a list of verified addresses that match your input. If you choose to instead enter the address information on the bottom portion of the screen, when you select the Zip Code box and pop up window will appear. This will verify the zip code you enter and automatically fill in the city, state and country.

Once the address has been entered, you **must** verify the address. Select the Verify Address button. A pop up will appear showing you a verified address. If that is the client's address, select it and then hit Next

*TIP If you directions to the address, you can select Map It from the bottom on the page.

After you hit Next, you are onto the final page of client demographics. On this page you can enter the client's phone number(s) and email address. You must also ask the client for permission to contact them by text and phone and record their answers in the appropriate boxes.
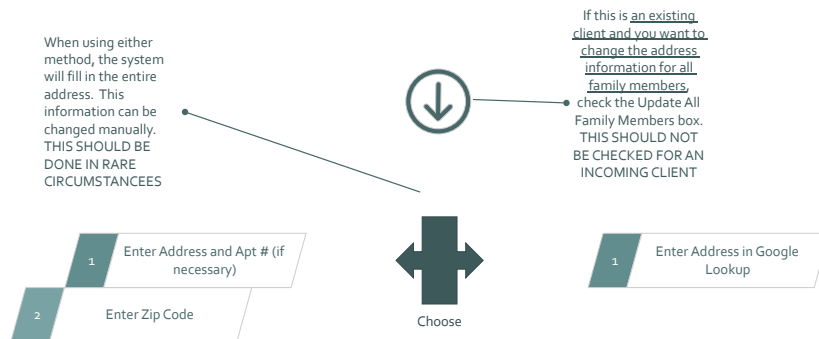
When using either
method, the system
will fill in the entire
address. This
information can be
changed manually.
THIS SHOULD BE
DONE IN RARE
CIRCUMSTANCEES

If this is an existing
client and you want to
change the address
information for all
family members,
check the Update All
Family Members box.
THIS SHOULD NOT
BE CHECKED FOR AN
INCOMING CLIENT

| 1 | Enter Address and Apt # (if necessary) |
| 2 | Enter Zip Code |

Choose

| 1 | Enter Address in Google Lookup |

Figure 5: address

Verify Address

The address verification should
show a selectable address that you
can choose. If this does not happen,
verify this the client that you have
the correct address. If you do,
choose - Do not ask for address
verification

Figure 6: verifyaddy

1	Enter Cell Phone Number
2	Choose OK to Contact by Phone
3	Choose OK to Contact by Phone
4	Enter Home Phone
5	Enter Work Phone
6	Enter (twice) Email Address

Cell Phone Number and
the two OK to Contact
fields are required

The Email address is
necessary if the client
will enroll in classes
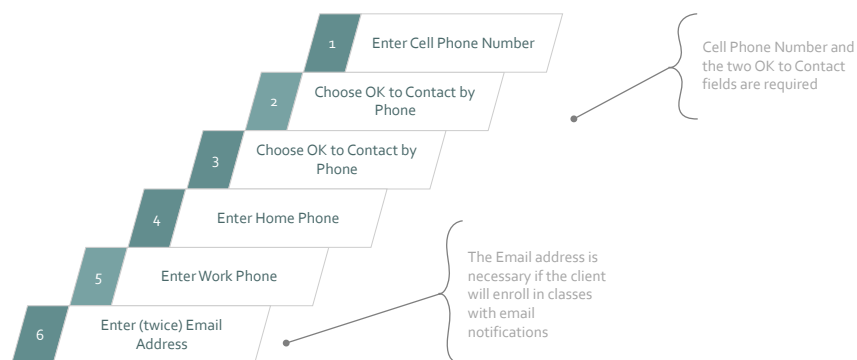with email
notifications

Figure 7: phone

Hit **Save** and now move on to the second step of the New Client Workflow.

##Add Family Members

When you create a new client, CW creates a ClientID as well as a FamilyID. All clients with the same FamilyID are grouped together. The first client is automatically added as the Head of Household. If this needs to be changed, contact the data team. If a family member needs to be removed from a family, whether because of a mistake in data entry or a change in the family, contact the data team. Attempting to rectify the situation yourself could result in orphaned clients and lost data.

If your client does not have family members to add, you can skip this step by hitting **Save** at the bottom of the screen.