1. Select Project Intake.



2. Select Add a new client.

Jill Track	
Intake (1259) ×	Add or Edit Do you want to add a new client or use the selected client?
Add or Edit	Add a new client
 Basic Client Information 	Vse the current client
 Family Members 	
Program Enrollment	Select another client

3. Search to see if client is already in the system.

SEARCH EXISTING CLIENTS

The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entry. Enter partial identifying information on the client, and then click Next to search from existing client records.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing client record by clicking on that row.
- . If there are no accurate matches, click Next again to continue to Step 2 in adding a new client record.

First Name:	David
Last Name:	Smith
Social Security Number:	777 - 77 - 5555
Birth Date:	01/01/1970 🔳

4. If the client is not in the system, proceed to add the information. Once the information is added click on saved or finished. If the client has family members enter them in the next screen. Exit out of the Program Enrollment.



5. Select Assessment.



6. Select VI-SPDAT and enter the client's information.

