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| **Summary:** Use Client Intake page to add new or edit an existing Client intake record; search for client in fields at top right on page |  |
| **Start**: **on Client Intake page:** * Click **NEW HOUSEHOLD**
* Enter Name, Date of Birth and Social Security Number, each item also has a Data Quality Code field
* Click **SAVE**

Blue fields are requiredSystem will search after Name/DOB and after SSN to find any existing matches |  |
| **Next**: **on Contact tab:** * Enter Address and contact information
* Click **SAVE**

Address data is shared among household members, each member can have their own phone and email address data |  |
| **Next**: **on Demographics tab:** * Select answer for all required fields in dropdowns
* Select appropriate Race(s)
* Click **SAVE**

Some items may fill automatically |  |
| **Next**: **on Income tab:*** If no income, leave ‘No Financial Resources’
* If there is income, Select appropriate Income Source and Pay Interval, enter Stated Income
* Select Non-Cash Benefits and Insurance information
* Click **SAVE**

Click **ADD** to create additional income records as necessary and repeat process  |  |
| **Next**: **Add additional Household Members:*** Click **NEW MEMBER**
* enter Name, DOB, SSN data and **SAVE**
* Repeat Contact, Demographic and Income steps
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| Make sure you check and verify all client data before enrolling a returning client into a new Program |  |