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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 required  System 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 |  |
| Make sure you check and verify all client data before enrolling a returning client into a new Program |  |