**The process to search for clients and enter and/or update the client demographic information has not changed. It is included in this for documentation purposes. This process has not change – continue to follow your agency’s approved procedures.**

1. Search the MIS system, using the Client Listing Page before entering the information. You can search by SSN, First Name, Last Name or DOB.





1. If the client is found, highlight the client name and click on the Client Intake v5.5 to update information such as – family members, income, education levels (if known), insurance (if known). Click the SAVE button when finished.





1. If the client is **not** found, click on the New Household. Consent level is region Client Intake v5.5 page, which means the entire Missouri CAA network can view the client data. The following information is required on the Contact Tab:

SSN Street Name

SSN Code City

 First Name County (always St Louis County)

 Last Name State (always MO)

 Date of Birth Zip

 Street # Zip Data Quality

* If there is an apartment address, that information can also be entered
* Phone number can be entered
* Be sure to click the SAVE button when finished.



1. After entering the Contact information, click on Demographics Tab to enter household member information.



1. The following information is required on the Demographics Tab for each family member that is entered on this page:

First Name Relation (HOH is always listed as HOF-head of family)

Last Name Disabled (if known)

Date of Birth Ethnicity (if known)

Gender Education level (if known)

Race Insurance (if known)

Housing Family Type

* Click the SAVE button when finished.
1. Click on the Income tab to add income.



1. Once the Client Intake information has been entered you are ready to enroll in the Life Skills program. On the Client Intake Page there is a button which will take you to program entry (right above the person’s head).  OR click on the Entry in the programs listing.





**THIS IS THE NEW PROCESS**



Click the new button to view the list of programs for enrollment - select the Life Skills program

Program status is enrolled

Consent level is ORGANIZATION

Case Manager will be entered once you hit the save button

Enter the ‘entry date’

Click SAVE.



To add the Life Skills ‘classes’ service and/or activity, click on Services & Activities:







Programs the client has been enrolled in will display.



Click on Intervention Tab



Click new to enter the service.

Enter the activity.

Enter the date service received.

Click Save



Pre & Post Test





Click New

Consent-Organization

Prog Component-Life Skills

Milestone-Class/Milestone you are complete the pre and post test

Activity Pre-Post Test

Date-Auto populates for today’s date

Click Save



Click on Question tab

Answer Questions



Save Answers



Click Submit



You have now successfully enrolled a client into Life skills, entered them into a Life skills class and completed a pre and posttest.