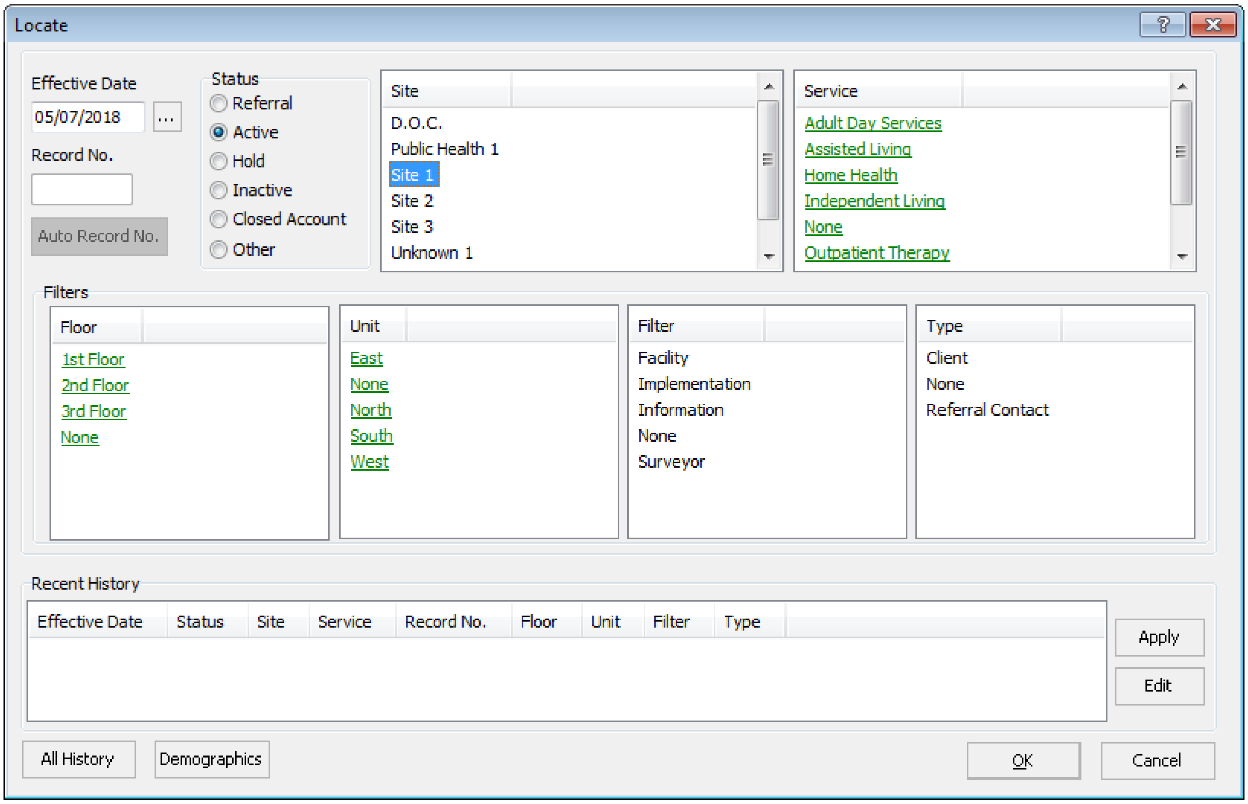
Enter a New Client

ADT/ Face Sheet	Demographic	Face Sheet	Diagnoses	Census	Documents	Other
Main Menu	Add/ Update Client	Admission	Add Diagnoses	Daily Census	Admission Agreement (e-Sig)	Write Internal Memo
		Re-Admission	View/ Edit Diagnoses	Statistics Calendar	Scan Documents	Appointments
		Discharge/ Transfer/ LOA	Diagnosis List (history)	Room/ Bed List	View Scanned/ Signed Documents	
		View/ Edit Face Sheet	View Inactive Diagnoses	Admission/ Discharge		
		Face Sheet Report	Diagnoses Report			

1. From the ADT/Face Sheet Access screen, click onto Add/Update Client.
2. Select New.
3. The Name Type window will appear with selections for Client, Vendor, and Provider. Select Client and click OK.
4. Enter in the client's demographic information.
    a. First name, last name, and birth date are all required fields. A new client cannot be created without these fields populated.
    b. Note that the Client Number is only used as a secondary tracking tool if a facility so chooses (optional to use). The Record Number is added in a later step.
    c. If the client already has an existing record in the database, enter the social security number and click Check SSN. The matching record will be found and may be selected.
    d. Select the Do Not Disclose checkbox if the client prefers his/her admission to not be disclosed to others.
5. Click OK to save. The Locate screen will automatically appear.



6. Complete this screen to indicate the client's status and location in the facility.
    a. The Status area on this screen only affects the client list, not the occupancy status.
7. Select the picklist box … to select the date of admission (effective date).
8. In **Status**, select **Active**.
9. If multiple Sites are listed, select the applicable **Site**.
10. If multiple Services are listed, select the applicable **Service**.
11. Select appropriate filters.
    a. Filters listed in green are required to create the record. Filters in black are optional.
12. Enter the **Record Number** (required) or click **Auto Record No**.
    a. If you skip the step of adding the Record Number, an alert will popup reminding you to enter the Medicare Record Number at this time.
13. Click **OK** to save the new client record.
14. Click **Close** to return to the ADT/Face Sheet Access screen.