AcademicEHR
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STUDENT TRAINING

CREATE A CLIENT

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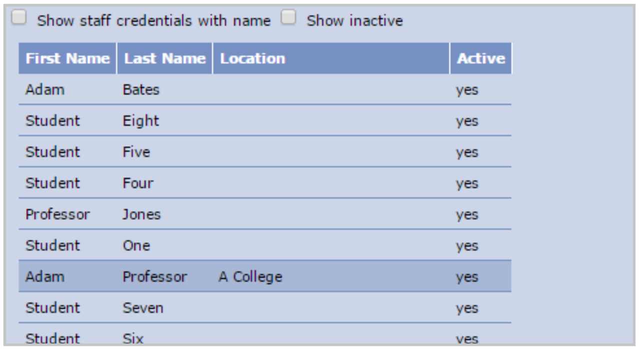
FILENAME | 03_STUDENT-TRAINING_CREATE-CLIENT

How to Create a Client

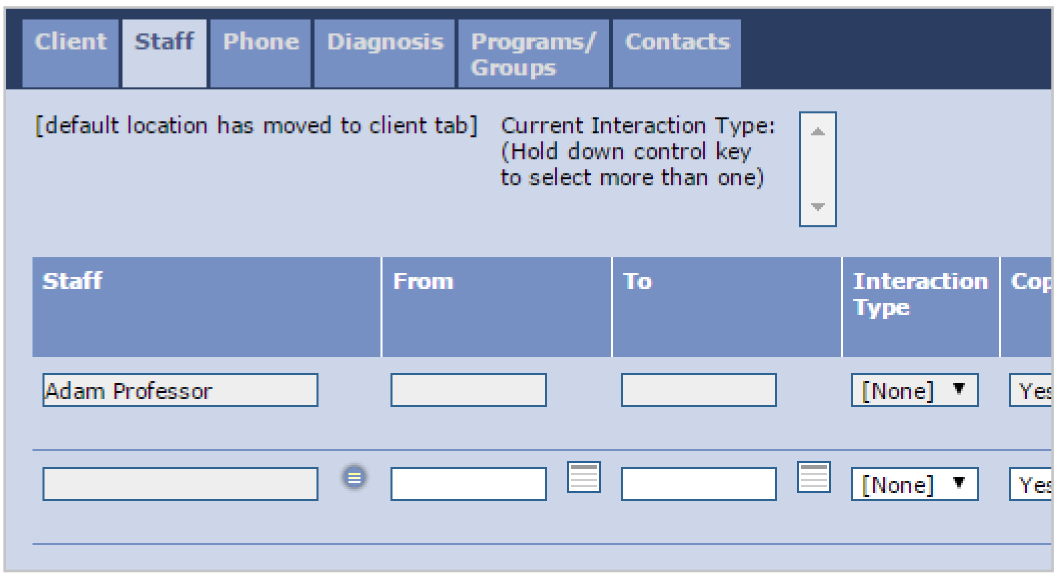
1. **Click on the Clients Module** in the upper left side of the screen.
2. **Click "Add"** in the upper right corner.
3. **Complete the following fields:**
   - **Intake Date and Date of Illness:** Enter today's date in both fields
   - **First Name, Last Name:** Choose something unique
   - **Address:** Fill in any street address
   - **Zip Code:** TIP: Fill in the zip code, then click the button to the right of the Zip field. Procentive will automatically fill in the city, state and county fields.
   - **Sex:** make a choice
   - **DOB:** Enter MM/DD/YYYY
   - **Optional fields:**
     - Marital Status
     - Employment
     - Student
     - Release of Medical Billing data
     - Privacy practice notice signed by client
     - Race/Ethnicity

4. **Click the Staff Tab**, at the top of the screen. The screen to the right will appear.
5. To the right of the Staff field, **click the pick list button** . A window will pop-up.
6. Find your name on the list. **Click on your name once.** It be highlighted in a darker blue.



7. Next, **click the OK button** .

8. If you have done things correctly, you should see your name listed in the staff field. **Click the save button** in the lower right to complete the process.



9. After clicking save, the client window will close. You will return to the main window in the Client Module and you should see the client you just added to the system.

10. If you do not see the client you added, click on the “Clients” link on the left side of the screen. This will refresh the screen, and make your client visible. (Clicking the “F5” key on your keyboard will also refresh the screen).

11. To re-open the client you created, just double click on the client’s name. You may also click once on the client name, and then click the Change button in the upper right corner of the system. This will open the client information in a new window.