



STUDENT TRAINING CREATE A CLIENT

How to Create a Client

- 1. Click on the Clients Module Clients in the upper left side of the screen.
- 2. Click "Add" 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

Client Staff Phone	Diagnosis Programs/ Contacts Groups					
Default location:	[None]					
Patient Number:	16	First Date of Illness:				
Intake Date:	10/23/2015	Date of Illness:				
First Name:	M.I.	Last Name:	allow lowercase			
Preferred Name:						
Family:	🗐 (Clear)	Relationship within family:				
Use address from the family indicated above (address set in family dialog): No 🔻						
Address:		get map (maps not guaranteed to l	be accurate)			
		County:	•			
City:		State:				
Zip:	0	E-Mail:		3560 Statements:		
Date of Birth:	(2012 years old)	Social Security Number:		choose 🔻		
Sex:	Female T	Marital Status:	Single •			
Employment:	Full Time	Parent/Guardian:				
Student:	Not a student 🔻					
Release signed by client of	medical billing data related to claim:	No Release on file	Date of signature:			
Privacy practice notice sign	ned by client:	Not signed 🔻	Date of signature:			
Reason file closed:	[not closed] edit reasons		Date file closed:			
White Black or African American American Indian or Alaska Native Asian Native Hawaiian or Other Pacific Islander Hispanic or Latino Other Race Declined to Specify						
Ethnicity:						
print	T 4	() <u>dashboard</u>		Help Save Cancel		

- 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.

Procentive

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Show staff	\Box Show staff credentials with name \Box Show inactive					
First Name	Last Name	Location	Active			
Adam	Bates		yes			
Student	Eight		yes			
Student	Five		yes			
Student	Four		yes			
Professor	Jones		yes			
Student	One		yes			
Adam	Professor	A College	yes			
Student	Seven		yes			
Student	Six		ves			

- 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.

Client	Staff	Phone	Diagnosis	Programs/ Groups	Contacts					
[default location has moved to client tab] Current Interaction Type: (Hold down control key to select more than one)										
Staff			From		То		Interaction Type	Сор		
Adam F	Professor	r					[None] 🔻	Yes		
			0				[None] 🔻	Yes		

- 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 Change in the upper right corner of the system. This will open the client information in a new window.

