

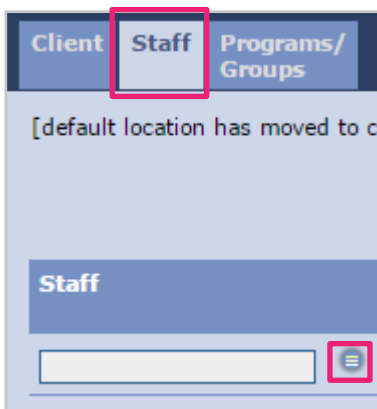




INSTRUCTOR TRAINING
CREATING CLIENTS

How to Create a Client

1. Click on the Clients Module **Clients**.
2. Click “Add” **+ Add**. The inset window to the lower right will appear.
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
 - **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.
 - **Address:** Fill in any street address
 - **Sex:** make a choice
 - **DOB:** Enter MM/DD/YYYY
4. Optional fields.
 - Marital Status
 - Employment
 - Student
 - Release of Medical Billing data
 - Privacy practice notice signed by client
 - Race/Ethnicity
5. Click the **Staff Tab**, at the top of the screen.
6. To the right of the Staff field, click the pick list button .

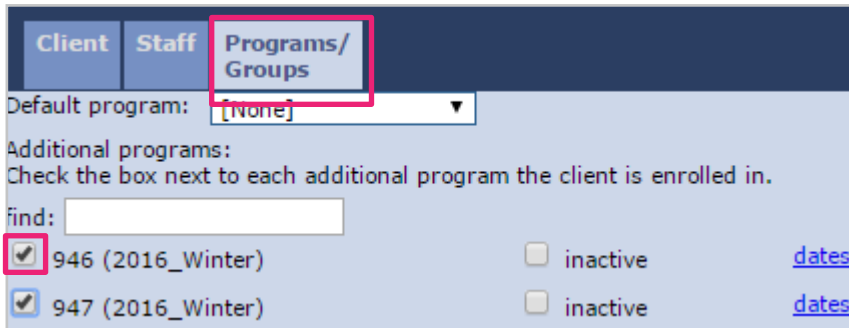


7. Find your name on the list.


- Click on your name once. It be highlighted in a darker blue.

8. Click OK .


9. Click on the Programs/Groups tab. Click the checkbox next to the applicable class you will be using this client for.



Client	Staff	Programs/Groups
Default program: [None]		
Additional programs: Check the box next to each additional program the client is enrolled in.		
find: <input type="text"/>		
<input checked="" type="checkbox"/>	946 (2016_Winter)	<input type="checkbox"/> inactive dates
<input checked="" type="checkbox"/>	947 (2016_Winter)	<input type="checkbox"/> inactive dates

10. Click the save button  to complete the process. The 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.

11. Refresh: If you do not immediately 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).

12. To re-open the client you created, just double click on the client’s name OR 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 screen or window.