Adding a New Client

Each client should have one and only one profile at your agency. Learn how to search for a client profile, select a client profile, add a new client and start a new episode of care (intake).

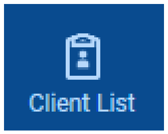
Table of Contents

Has this client been to your agency before?

Before adding a new client, begin with a careful search to learn whether this client has been to your agency in the past.

Click on **Client List** then fill in one or two search boxes.

Click on the **Advanced Search** button for additional search options. Be careful to search for only a few elements at a time and only add more when you get too many results. Search for the key elements that uniquely and individually identify the client.

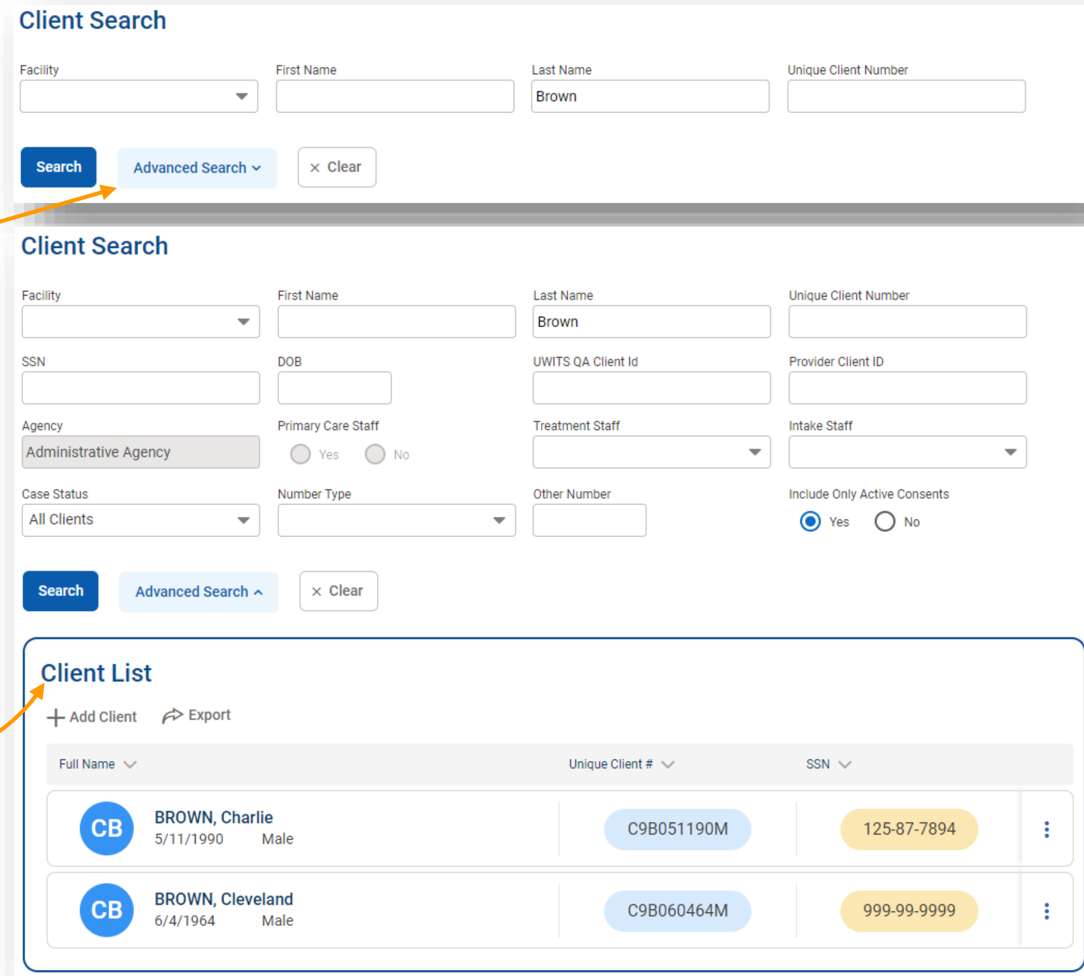


Be thorough. For example, you could search for:

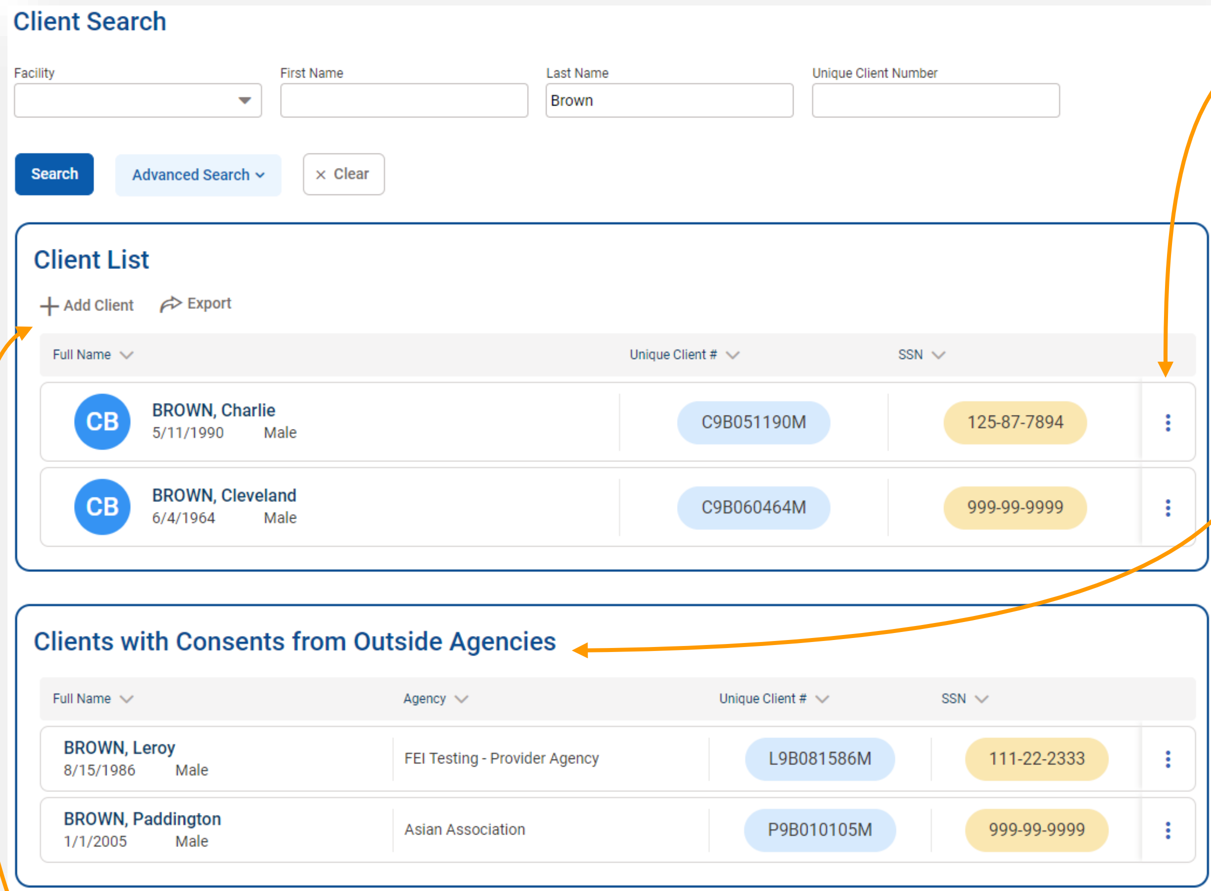
- Social Security Number, or
- Search for the client by any alternate names they may have, or
- Search for their birthdate by typing it into the Unique Client Number box, with asterisks on each end like this: *123199*

Client List

After searching for your client, if they already exist in your agency, it will appear in the **Client List** in the middle of your screen. This is where you will access clients that exist in your agency.



Tip! Don't know how to spell someone's name? No problem! Use an asterisk (*) in place of the letters for which you are unsure. For example, typing Br* in the last name box will find last names like Brooks, Brady, Brown or Brent.



If you find a client profile already existing for this client then hover over the action button (⋮) and click **Profile** or to view existing activity for the client, click **Activity List**.

Clients with Consents from Outside Agencies

If you have rights to this, you may also see your client listed in the lower section.

The Agency field shows which agency has consented the client record to you. Hover over the action button (⋮) and click on **Activity List** to view the consented information.

Each agency's consented activities must be viewed separately.

To Link a Consent

To link the consented information to an existing client, hover over the action button (⋮) and click on **Link.**

Don't see your Client?

If you have searched and are certain that your client isn't already in UWITS, click on +**Add Client** to add a new client profile.

Please note: If you find two or more profiles for this client at your agency then this is an error and must be corrected. Please coordinate with your Agency Navigator to properly handle the duplication.

Creating a New Client Profile

To create a client profile, you must complete all required fields.

Entering a Client Name

There are rules for entering a client name properly.

#1 – Do not use special characters. Hyphens and spaces are allowed in first and middle names. Only hyphens are allowed in last names.

#2 – Enter the person's complete, legal name—including middle name where possible.

#3 – If the person doesn't have a middle name, leave blank.

#4 – Use the Alternate Names page for preferred name, nicknames, aliases, alternate names and so forth.

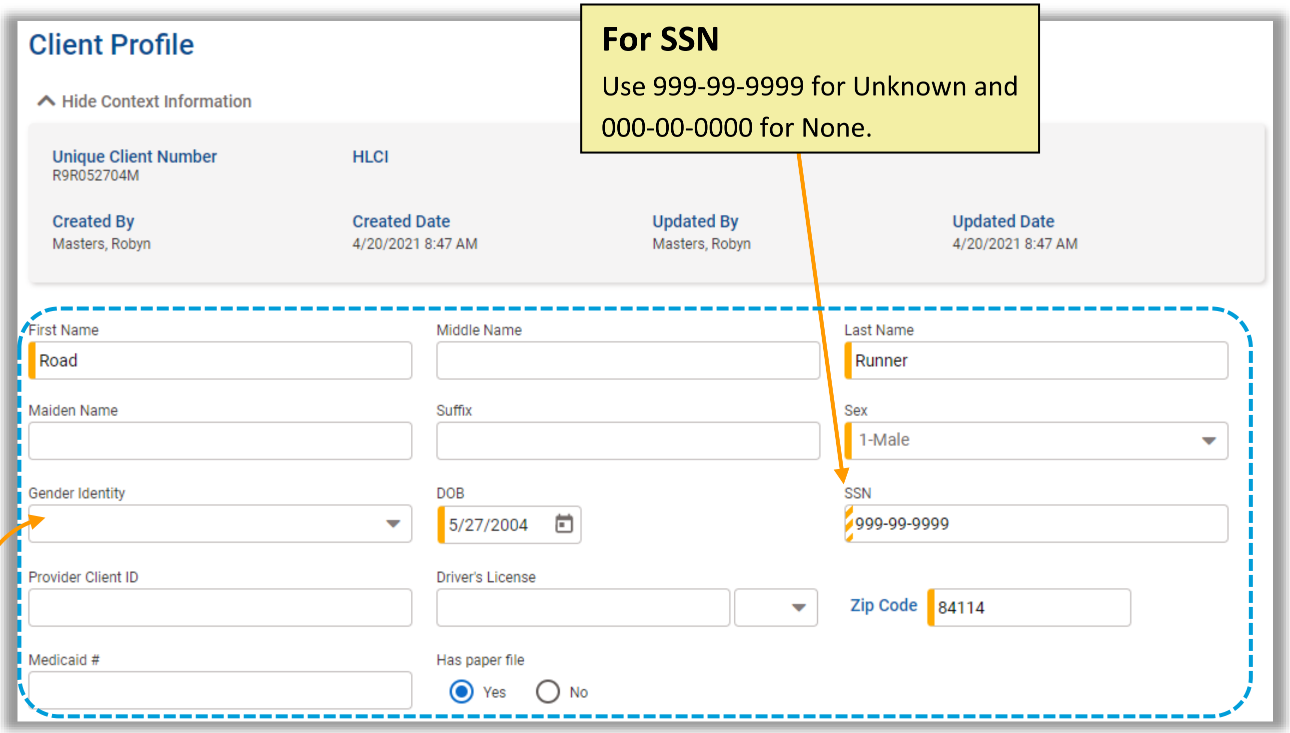
#5 – Titles, Prefixes, Suffixes are not allowed in the name fields.

Questions About Names

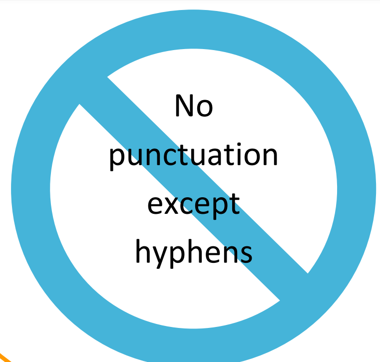
What if my client's first name is an initial?
The initial can be entered in the first name field but no periods.

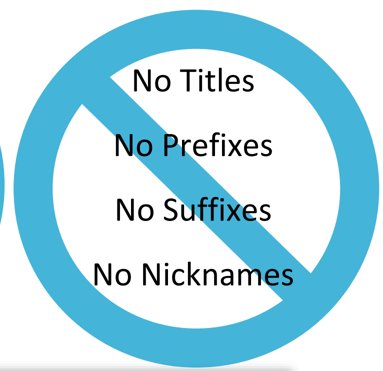
What if my client's last name is like O'Malley?
Leave out the apostrophe.

For SSN
Use 999-99-9999 for Unknown and 000-00-0000 for None.



The gender field has been renamed **Sex** and a **Gender Identity** field has been added. Please use **Sex** to describe gender at birth and use the **Gender Identity** field as needed. If the Gender Identity field is completed, the value will appear in the Client Header.



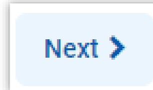


Client **Age** is given at the center of the client header.

Do you have a situation not covered here?
Contact your Agency Navigator for assistance. If they are unsure of the answer, they can forward your question to the UWITS Support box.

Alternate Names

Does your client have multiple names? Click **+ Add Alternate Name** in the **Alternate Names** section.

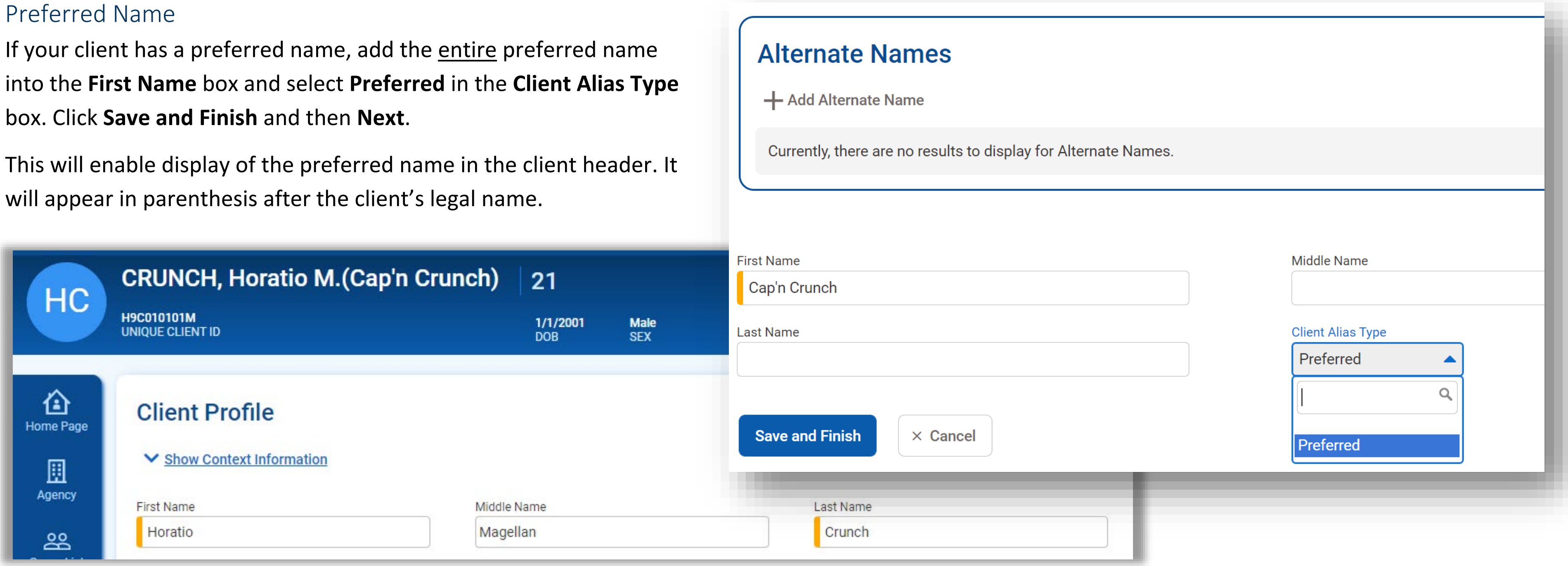


There are several screens within the Client Profile. Click the **Next** button to move through them sequentially.

Preferred Name

If your client has a preferred name, add the entire preferred name into the **First Name** box and select **Preferred** in the **Client Alias Type** box. Click **Save and Finish** and then **Next**.

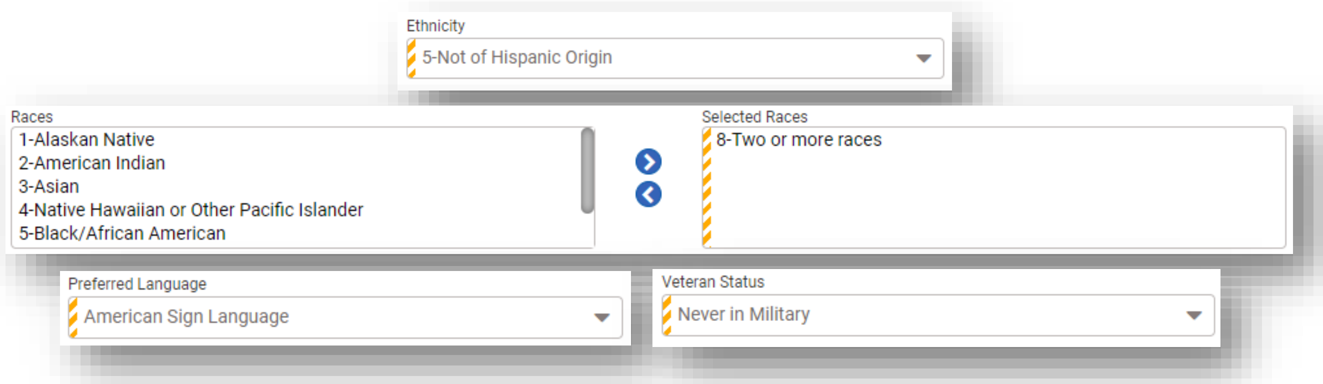
This will enable display of the preferred name in the client header. It will appear in parenthesis after the client's legal name.



If the client has both a preferred first name and a preferred last name, also add a second **Alternate Name** with the first name entered into the **First Name** box and the last name entered into the **Last Name** box as usual. This time, leave the **Client Alias Type** blank. This second entry will ensure that searching by the client's preferred name will display their client profile just as well as searching for their legal name.

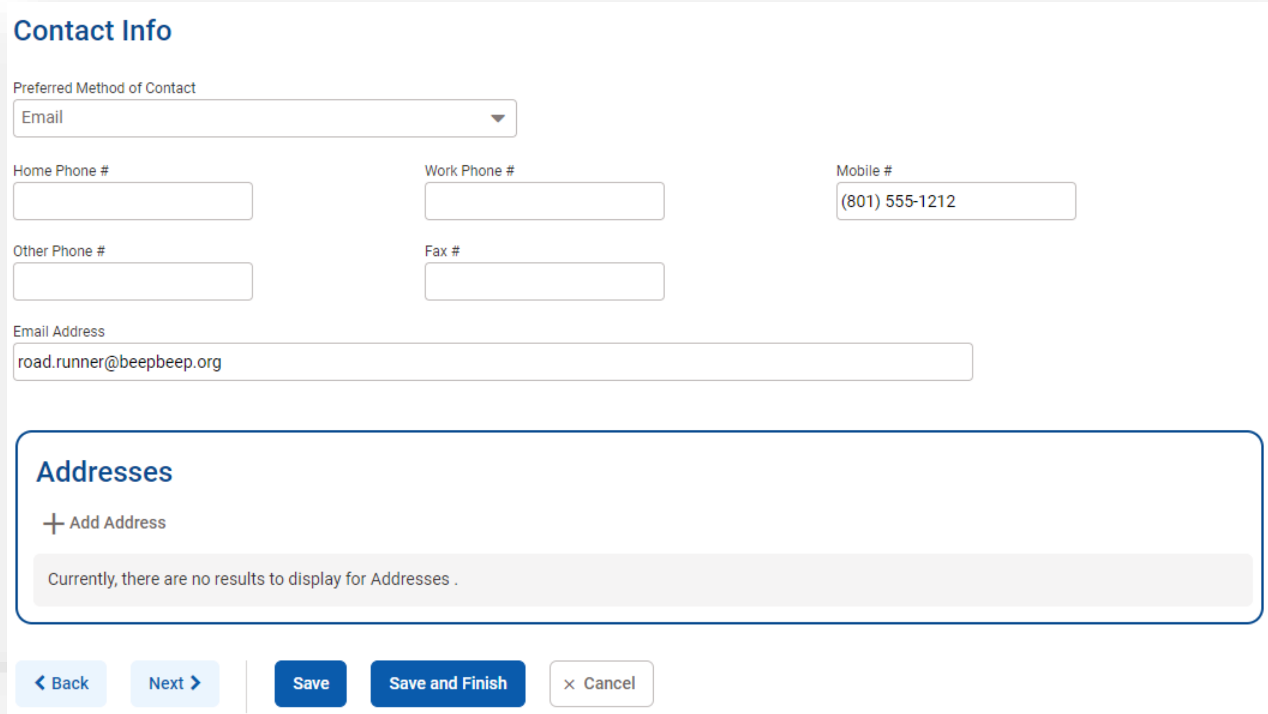
Additional Information

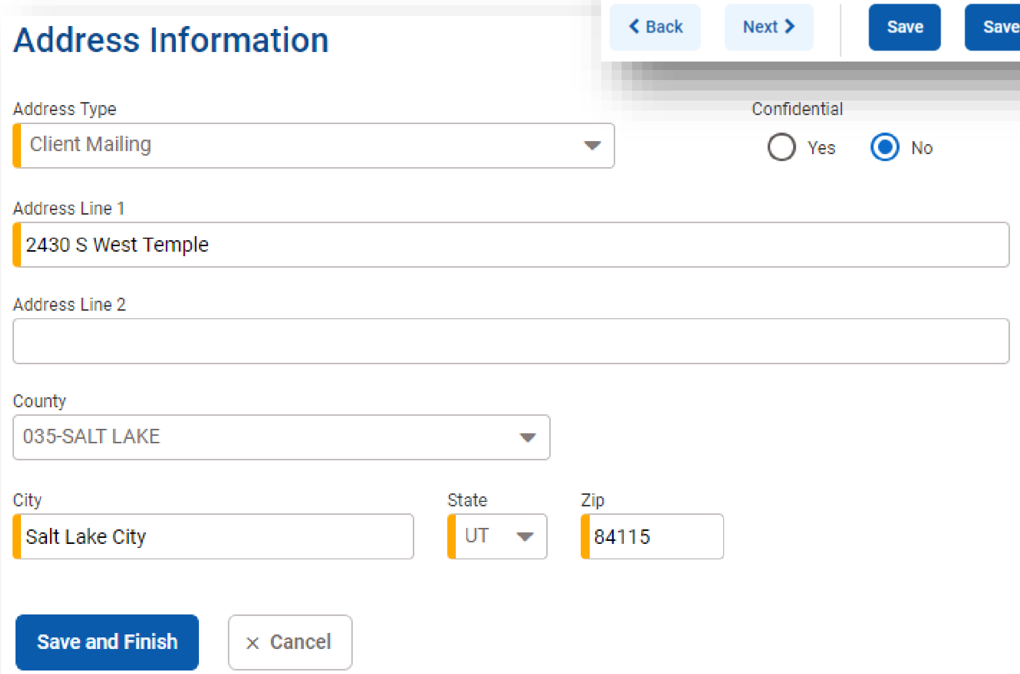
The **Additional Information** section has required fields that must be populated to complete the profile. If you have additional information, such as **Contact Information**, click **Next** to continue adding data. Otherwise, click **Finish**.



Contact Information

Add phone, email and select a preferred method of contact.





Address

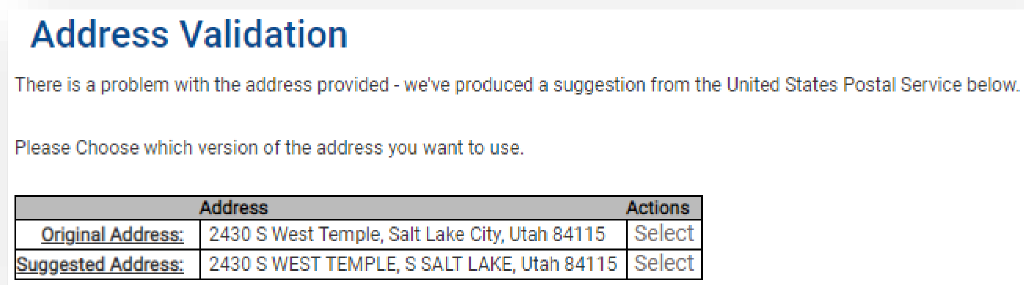
To add an address, click the **+ Add Address** link in the Addresses box.

Enter the address and click **Save and Finish**.

Address Validation

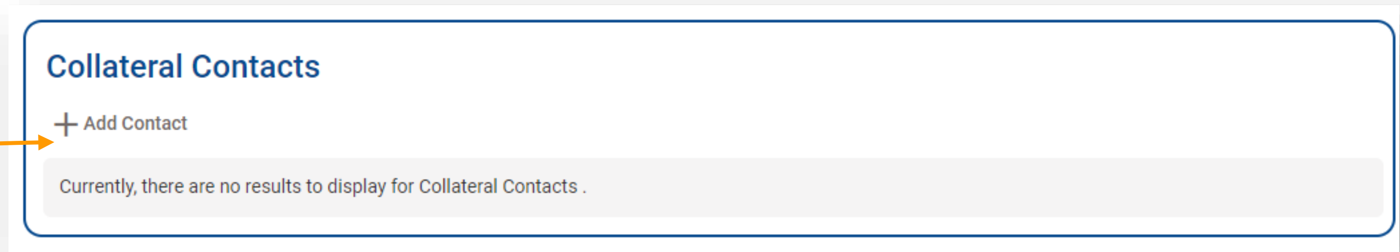
You may be given an opportunity to select a verified address. If so, click the **Select** link next to the address which is the most correct.

Click **Next** to continue.



Collateral Contacts

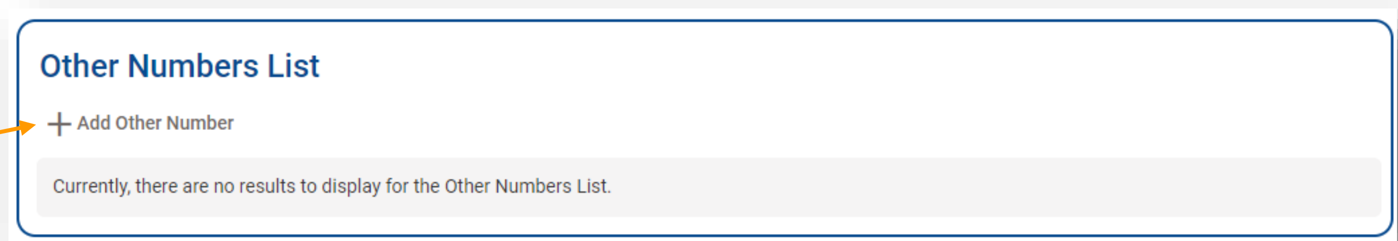
Does your client have a guardian? Probation officer? Add contact info for spouse, parents, guardians, probation officers, etc.



Click the **+ Add Contact** link to begin. Fields with a solid or striped yellow bar to the left are required. Click **Finish** to save.

Other Numbers

Does your client have another assigned, identifying number that you need to track?



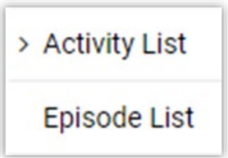
Click the **+ Add Other Number** link to begin. Fields with a solid or striped yellow bar to the left are required. Click **Finish** to save.

Note: For multiple entries in any screen, click **Save** and repeat the steps.

Client Intake

An Intake is the beginning of an episode of care at a facility and is required before any other activities can be recorded. A client should only have one Open Active intake at a facility at any given time.

Start a New Episode



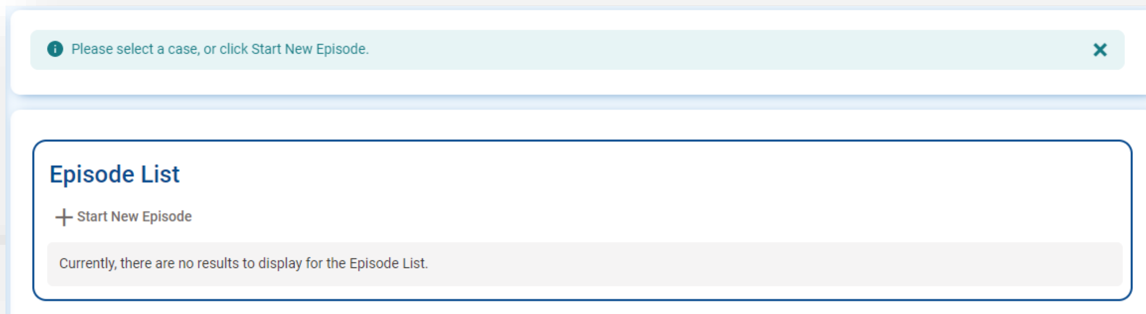
Before you begin:

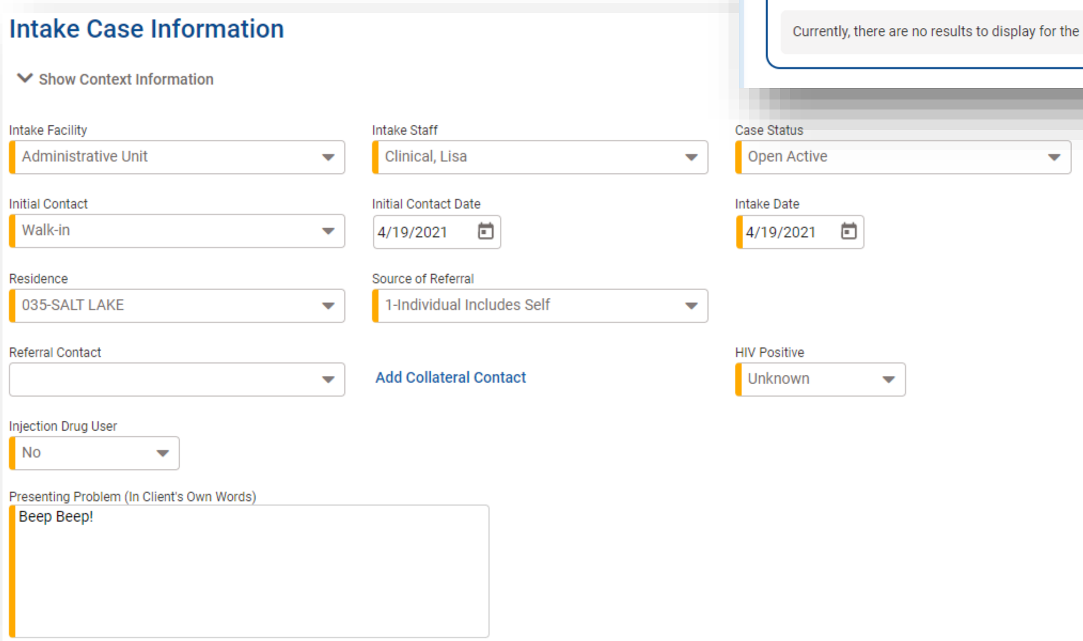
- Have you selected the correct facility?
- Have you selected the correct client?

If your agency has multiple facilities, this is important for you to be aware of at all times.

Start New Episode

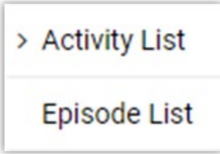
An Intake can only be completed if the client has no existing, active Intake record at the same facility or once all previous cases at the same facility have been closed. If the client you have selected does not have an active Intake at the same facility, when you click **Activity List** or **Episode List** then you will receive a message “Please select a case or click Start new Episode.”





Double check that your facility is correct, then click the link to open a new case. This will open the Client Intake screen.

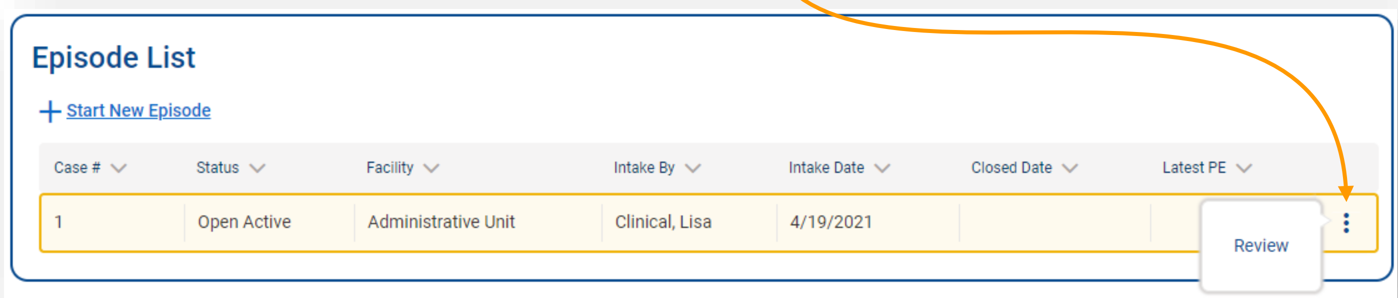
Complete all required fields and click **Save and Finish**.



Does your client already have an Episode at your facility?

If so, click **Episode List** to view the list of cases. Then hover over the action button (⋮) and click **Review** to open an existing case.

UWITS will then display the **Activity List** for that specific case and allows you to review all activities entered under that specific episode of care. Hover over the action pencil and click **Review** to view or edit any activities within the Client's **Activity List**.



Tip! If the client has multiple episodes at more than one facility, your context will change when you review an episode at a facility different than your current context.