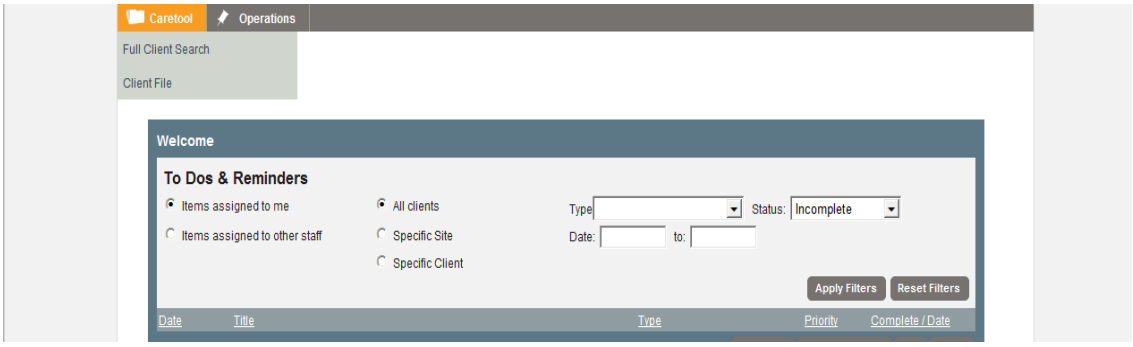
QuickGuide:
Adding a New Client in DAARS

Adding a new client is a relatively straightforward process. It is imperative to not create duplicate records, so the first step to adding a new client is to search the system to ensure that they are not already there.

Searching for a Client with the Caretool

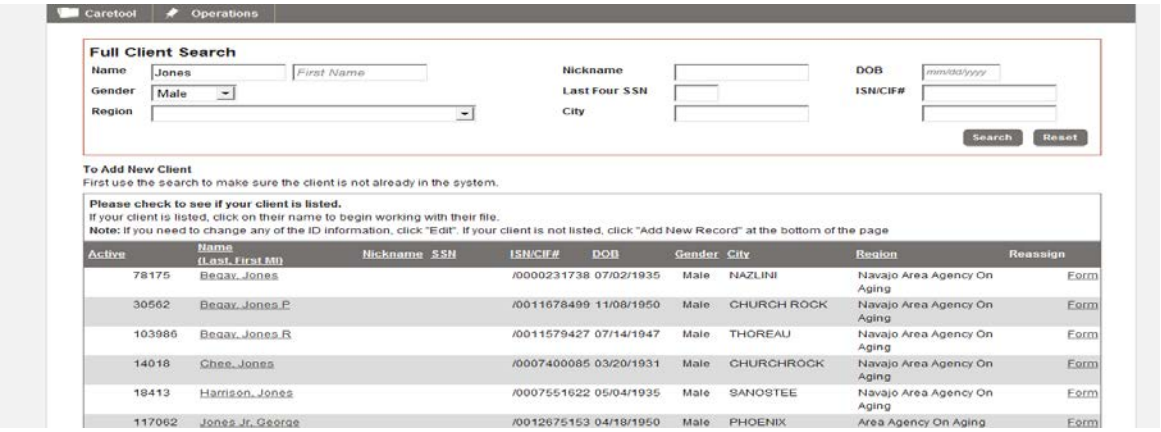
Client Searches are available in two styles:

- Full Client Searches
- Client File



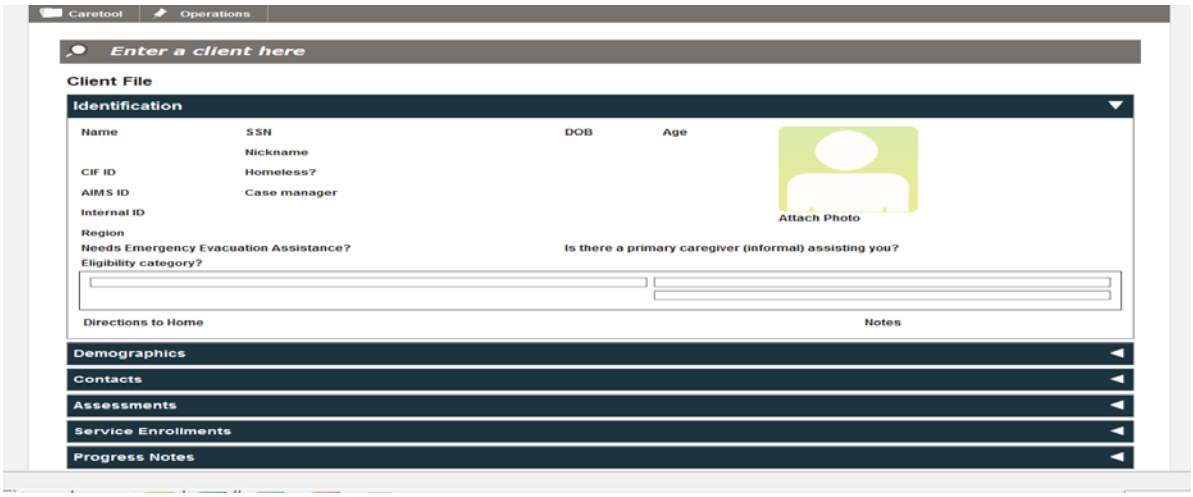
Select 'Full Client Search' in the Caretool

In a traditional **'Full Client Search'**, you will enter Name, Gender, Region, DOB, or other information and click search. Remember: When searching, less is more. Searching using fewer parameters and fewer letters means you will get more hits (and avoid missing a duplicate record with a typo).This will produce a list of client records with names similar to the client you want to add.



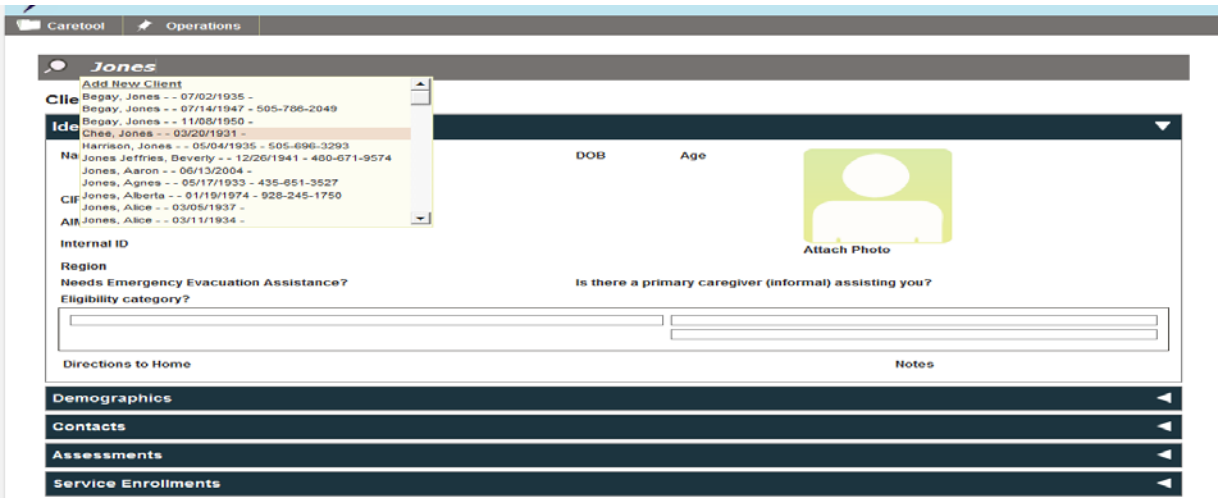
If you have a match that you can verify is correct select that client and edit that record. If you do not have a match you will add a new client by selecting **'Add New Record'** at the bottom of the page.

Select 'Client File' in the Caretool



In '**Client File'** the search uses an Ajax search bar. This type of search displays a drop-down list of results as soon as you begin typing. As you type, the list shortens, displaying only the appropriate options based on exactly what has been typed at the present moment.

An Ajax search looks like this:

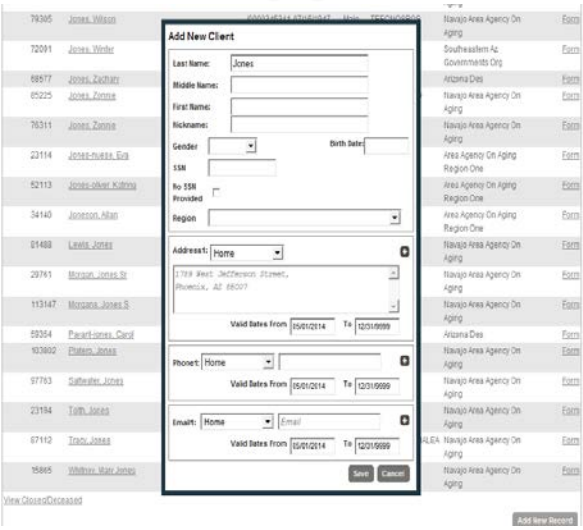


If you think you have a match off the list, select that client and verify that it is the right person. If it is you can proceed to edit that record. If you do not have a match, re-enter client's name information and then select **'Add New Client'** at the top of the drop-down list and to add the person as a new client.

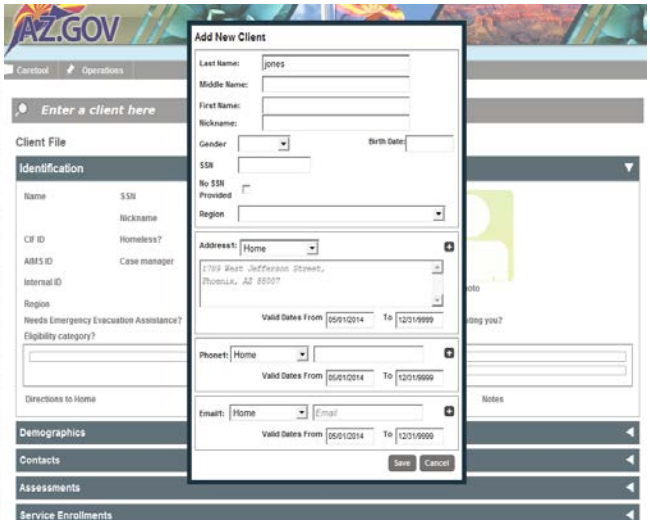
Adding a New Record

If searching for the client you do not find a match with either **'Full Client Search'** or **'Client File',** you will select **'Add New Record'** as described previously. Your screen will look like one of the following, **'Full Client Search' (A) or 'Client File' (B):**

A

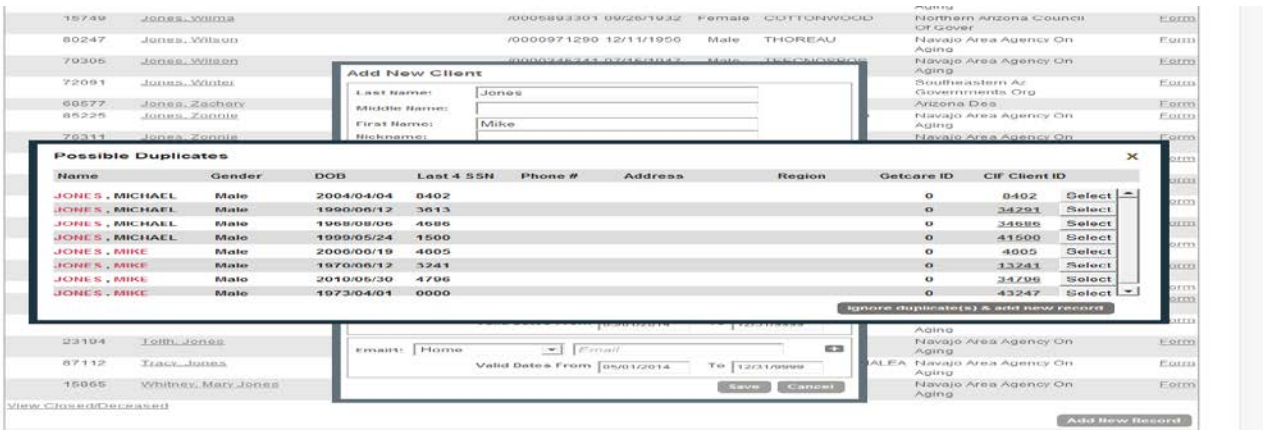
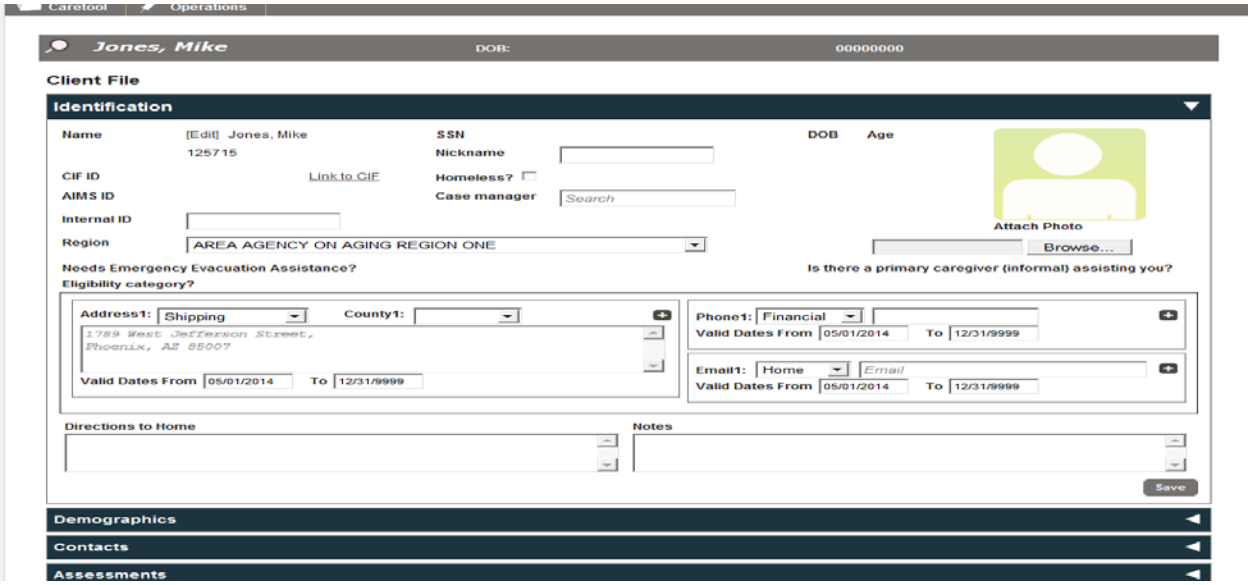


B



When adding a new client you *must* enter in the name, SSN (or select No SSN Provided), and designate a region. Currently, these are the only fields required to add a new client, but adding information at this time related to gender, DOB, address, and phone are helpful in determining if there are existing duplicates already in the system. In order for the client to be created, you must click **Save**. If you do not want to save, click **Cancel**.

If there are existing clients with similar names a **list of possible duplicates** will be displayed for you to look through and make sure your client does not already exist in the system. If you have a verified match, select that client and you can proceed to update that record. If you do not have a match, select **'Ignore duplicate(s) & add new record'** at the bottom right corner of the window**.**



Once the client is created you can proceed to add additional information to client's record by selecting the appropriate horizontal bar to access the area you want to edit. Here is what your initial client screen will look like: