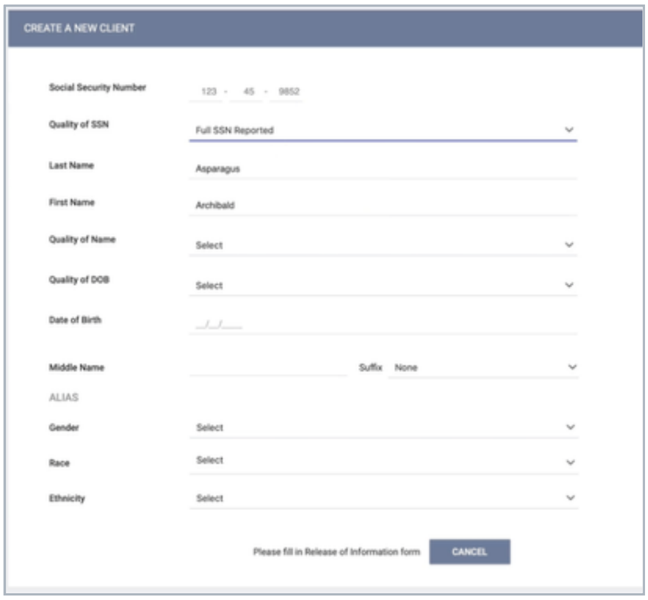
New client record

Clarity System Basics

How to add a new client record

When adding a new client record, filling out all the fields accurately ensures consistency and quality data. If the information about your client is inaccurate or incomplete, it can impact the quality of the services provided.

New client record steps



1 Search for existing records

After search combinations are exhausted, you can confidently add the new client.

2 Fill out the HUD data points

Populate the Client Search form as completely as possible, including:

- Client's name
- Client's Demographics
- DOB
- Social Security number
- Social Security number data quality
- Veteran status.

3 Complete ROI Form

Update the Release of Information section. This section requires *you* to mention where the ROI or release of information document is stored.

Pro Tip

Duplicated SSN? Clarity will show you a pop-up message in the event that the SSN entered has been registered before.

Note: This guide covers the essentials of the Clarity System Basics Training. We recommend reviewing the training course for a complete overview.