

# 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.

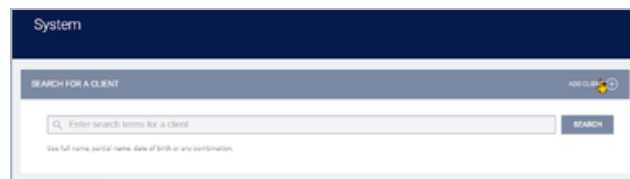


## New client record steps

1

### Search for existing records

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



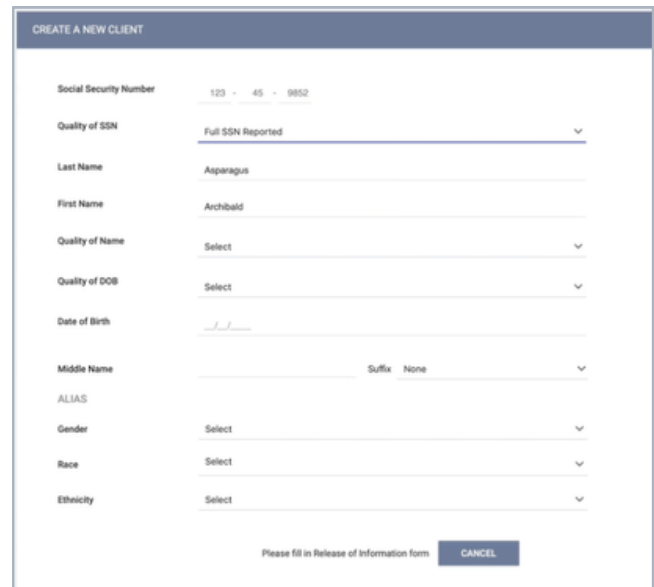
The screenshot shows a web interface titled 'System'. Below the title is a section 'SEARCH FOR A CLIENT'. It contains a search bar with the placeholder text 'Enter search terms for a client' and a 'SEARCH' button. Below the search bar is a small note: 'Use full name, partial name, date of birth or any combination.'

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.



The screenshot shows a web interface titled 'CREATE A NEW CLIENT'. It contains a form with the following fields: Social Security Number (123 - 45 - 9852), Quality of SSN (Full SSN Reported), Last Name (Asparagus), First Name (Archibald), Quality of Name (Select), Quality of DOB (Select), Date of Birth (MM/DD/YYYY), Middle Name (Suffix None), ALIAS, Gender (Select), Race (Select), and Ethnicity (Select). At the bottom, there is a note 'Please fill in Release of Information form' and a 'CANCEL' button.

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.