UWITS Tip Sheet

Adding a New Client

Client Search **Client Profile** **Client Intake**

This tip sheet focuses on the elements required for adding a new client and starting a new episode of care (Intake).

Total Pages: 7

UWITS

Adding a New Client

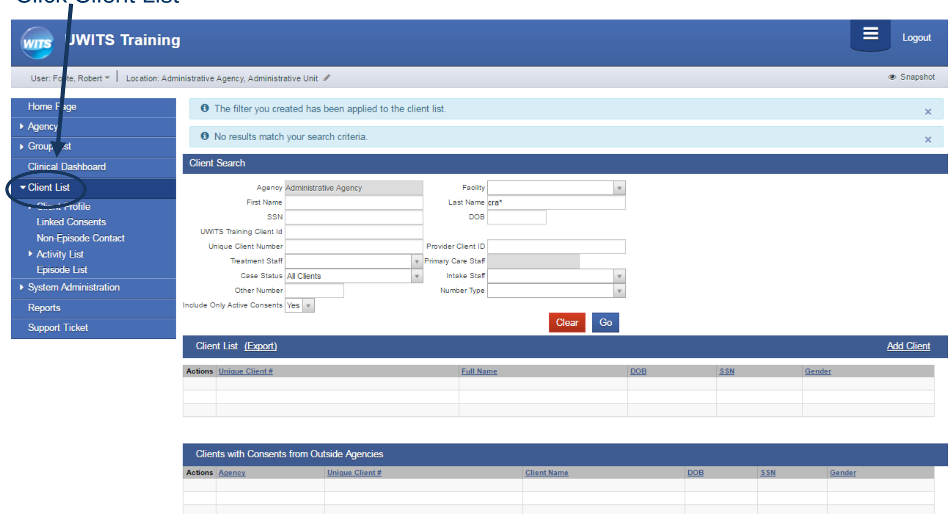
Client Search

1. Entry Steps: Login, Select Facility, Select **Client List** from left Menu to generate the Client Search Screen.

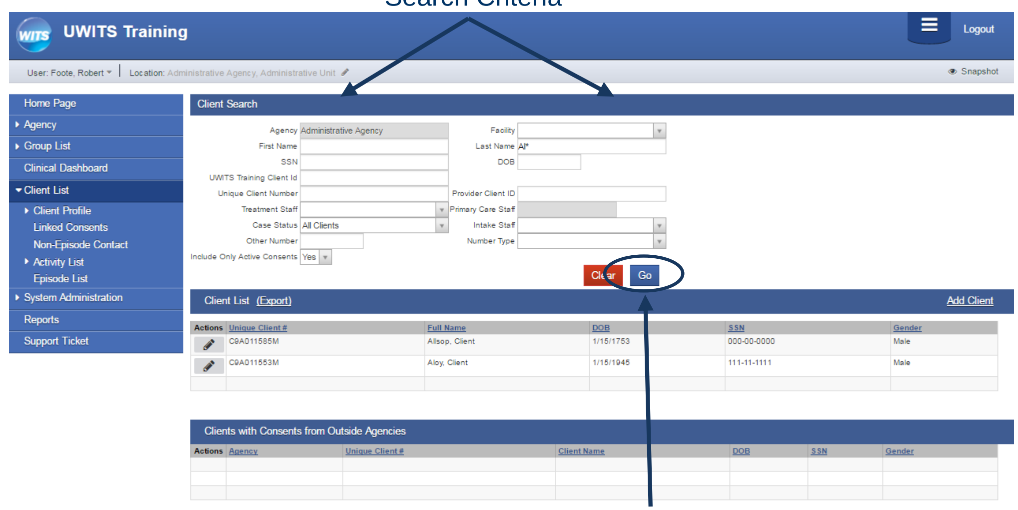
2. Client Search: Before adding a client to UWITS, make sure that the client has not been admitted to your agency/facility previously. You can search for a client by entering the client's First Name, Last Name, SSN, DOB, etc. or a combination thereof. However, the more criteria you search by, the more specific the search and you may/may not find the client; therefore, this is not recommended. You can also broaden your search by using an '*' in place of letters if you are unsure of the spelling (e.g. entering bro* searches for a name beginning with "bro").

Note: To search for all active clients, choose 'Clients with Open Cases' in the drop-down list. To generate a list of a staff's active cases, you would choose the staff member and then choose 'Clients with Open Cases' (note: this applies <u>**only**</u> if the staff member's name is selected in the 'Intake Staff" field on the Intake screen). When you have entered your search criteria, click <u>**Go**</u>.

To Search for Clients
Click Client List



Search Criteria



Enter your search
criteria and click Go.

Adding a New Client

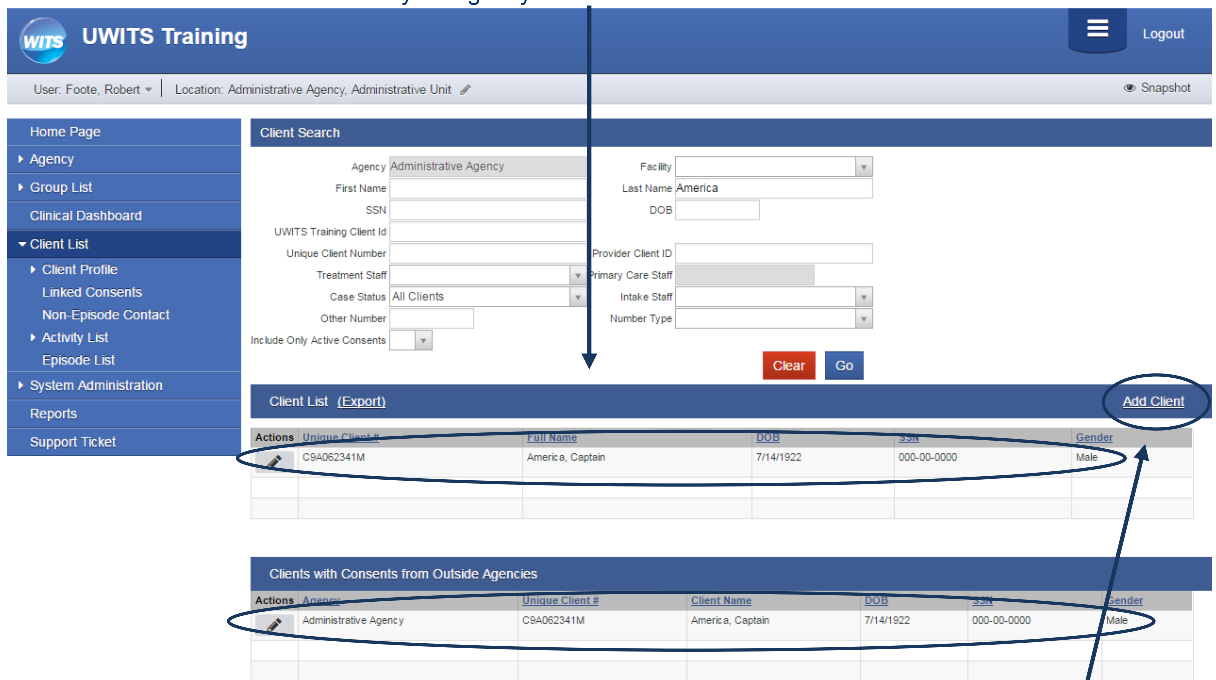
Viewing an Existing Client or Adding a New Client

When searching for Captain America, the search results reveal client in two places. The Client List shows your agency's record.

1. Client List: After searching for your client, if your client exists in your agency, it will appear in the **Client List** in the middle of your screen**.** This is where you will access clients that have records in your agency. To view an existing client's profile, click **Profile** or to view past activity for the client, click **Activity List.**

2. Clients With Consents From Outside Agencies: After your client search, you may also see your client listed in the 'Clients With Consents From Outside Agencies' list at the bottom of your screen. You can immediately identify the agency record that has been consented to you, by viewing the Agency field in the list box. Clicking on **Activity List** will allow you to view the consented information for the client from a particular agency. Each agency's consented activities should be viewed separately.

3. Adding Client: If the client is not found through the Client Search process, proceed to **Add Client.**



Captain America is also listed under Clients with Consents from Outside Agencies.

If the client is not found, to add a new client, click **Add Client**.

Adding a New Client

Create Client Profile

1. Entry Steps: Login, Select Facility, Client Search.

2. Add Client: After searching for the client you determined that s/he does not have a record at your agency/facility. Click **Add Client**.

3. Client Profile: To complete a client profile, you must complete all of the required fields highlighted in dark and light yellow. There are several screens within the Client Profile, including: Alternate Names, Contact Information, Additional Information, Collateral Contacts, Other Numbers and History.

Note: the Agency Client ID is your agency number.

☐ Click Add **Alternate Names** if the client has a nick name, name change through marriage, divorce, etc. Click **Next.** To move to the next page, click **Next**.

☐ Add the race and ethnicity, preferred language and veteran status under 'Additional Information'. This section has fields that are required for State Reporting, Click **Next.**

☐ Add the client's address and telephone numbers under 'Contact Information'. Click **Next**.

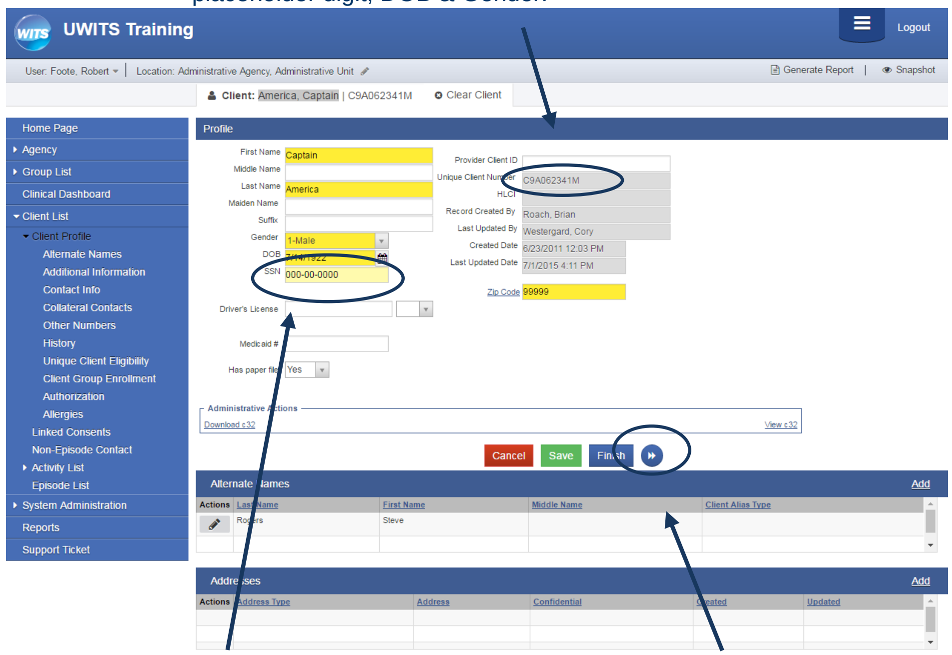
☐ Add spouse contacts, parents, guardians, probation officers, etc. under 'Collateral Contacts'.

☐ Additional numbers such as court docket numbers, ASSIST ID, other SSNs, etc. can also be added under 'Other Numbers'.

☐ After completing all sections of the module, click '**Finish**' to return you to the screen you started from or **'Save**' to save your work and stay on this page.

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

The Agency Client ID is composed of First & Last initials separated by a placeholder digit, DOB & Gender.



For SSN:
use 999-99-9999 for NONE
or 000-00-0000 for UNKNOWN

Click **Next** to advance to the next screen.

Adding a New Client
Naming Rules:

Spaces: Allowed in first and middle names. NOT allowed in last names.

Hyphens: Allowed in first, middle and last names. It is the only allowable punctuation character allowed.

Numeric characters: Not allowed in any name

First name is an initial: The initial can be entered in the first name field but no periods.

Middle name: If there is no middle name or it is not available, *leave blank*. Supply the full legal middle name where possible and the middle initial if that is all that is available. Periods are not allowed.

Enter legal names rather than nicknames – Use the Alternate Names page for nicknames.

Titles, Prefixes, Suffixes: not allowed

Naming rules synopsis:

Character	Last Name	First and Middle Names
Alpha Characters (abc..)	Allowed	Allowed
Hyphen (-)	Allowed	Allowed
Spaces	Not Allowed	Allowed
Other Characters: Apostrophe, quotes, commas, periods, parens., etc. (‘ , “ .)	Not Allowed	Not Allowed
Numeric Characters (123..)	Not Allowed	Not Allowed

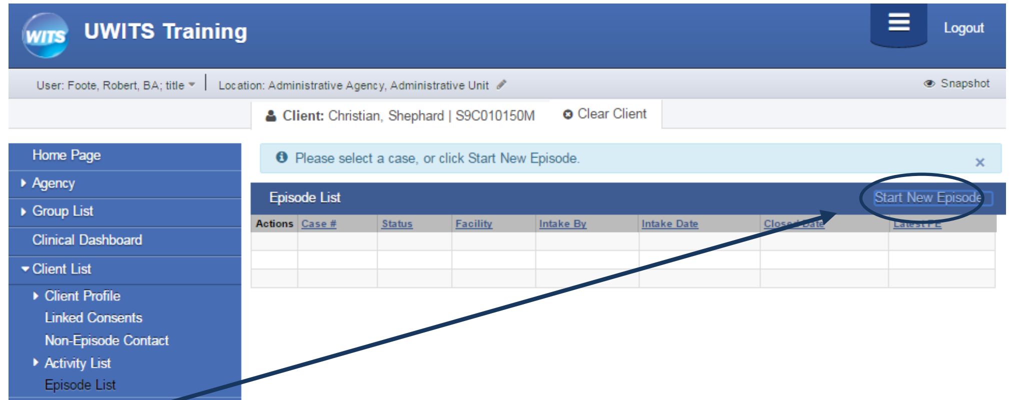
Client Intake
New Episode

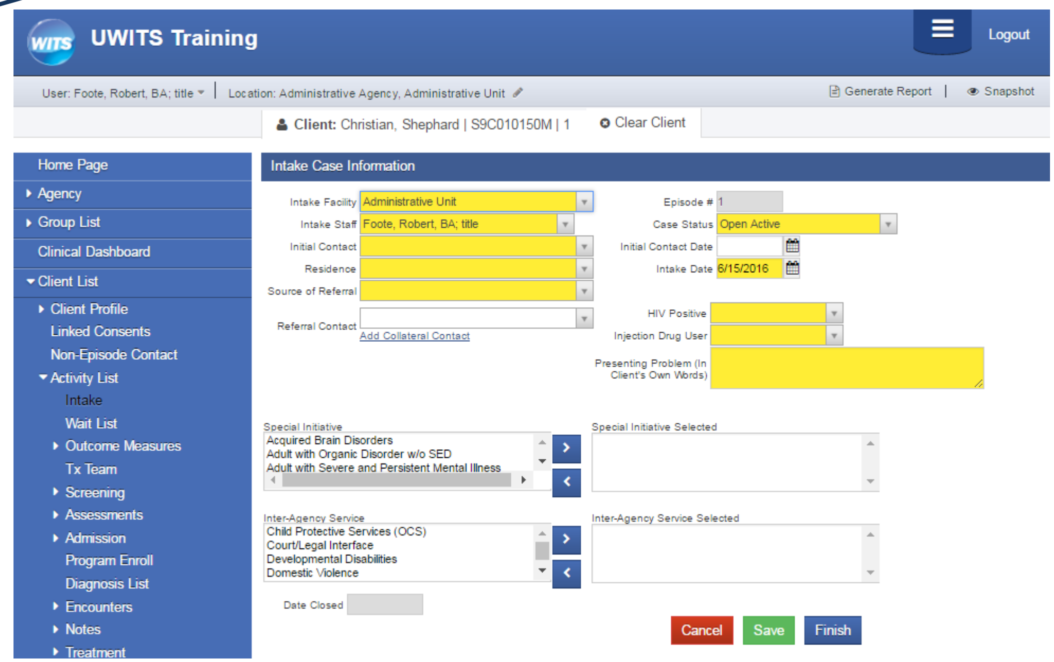
1. Entry Steps: Login, select Facility, Client List,select client, Episode List.

2. An Intake is the beginning of a new episode of care at a facility and is required before any other clinical activities can be recorded.

3. 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. When you click **Activity List** or **Episode List**, you will receive a message “Please select a case, or click Start new Episode.”

To open a case, click **Start New Episode**. This will open the Client Intake screen. Complete all required fields and click **Save** or **Finish.**





Client Intake
New Episode

4. Reviewing Cases: If the client has one or more cases at your facility (active or closed), click **Episode List** to view the list of cases and then hover over the action pencil and click **Review** to open an existing case.

UWITS will then display the Activity List for that specific case only and allows you to review all transactions completed under that specific episode of care. Click **Review** to view or edit any transactions within the Client's Activity List.