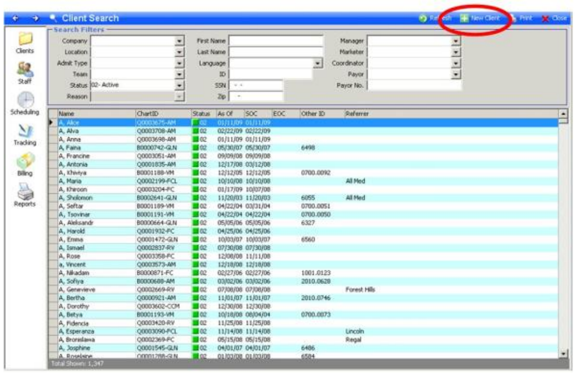
CREATING A NEW CLIENT

This procedure is done through a wizard that guides the user step by step.

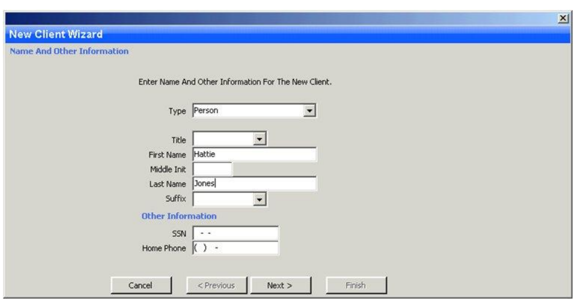
1. Click on the New Client button.

New Client Button



2. The New Client Wizard is displayed. Type the personal information of the client. The only required fields are First Name and Last Name.

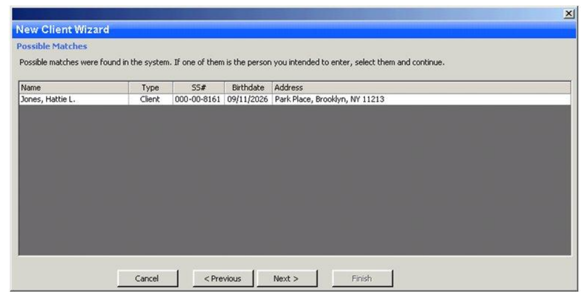
Enter Name



There are two possible Client Types: "Person" (which is the default) or "Company". Click on Next to advance to the next Screen.

3. If the system finds an existing client with the same or similar name as the one we are entering, the system will identify it and display the following message:

Similar Name

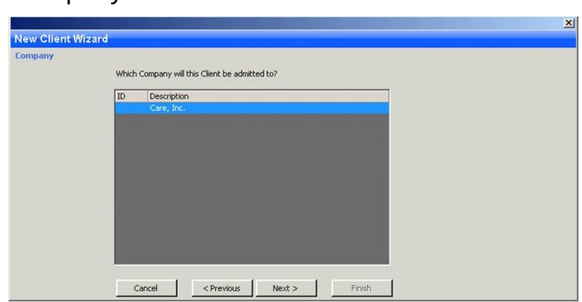


If adding a new admission type to the client listed here, then click on it to select it and click on Next. The system will associate any further action to this client.

If we are sure that we are not creating a duplicate client, click on Next. The Wizard will continue to the next step.

4. Click on the name of the Company that the client will be associated to and click on Next.

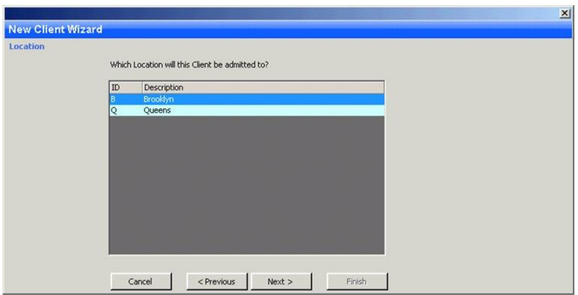
Company Name



CLIENTS MODULE

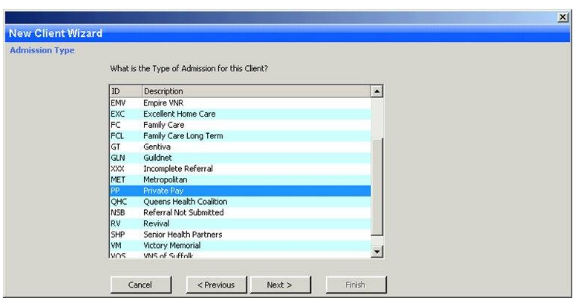
5. Click on the Location the client will be admitted to and click on Next.

Location

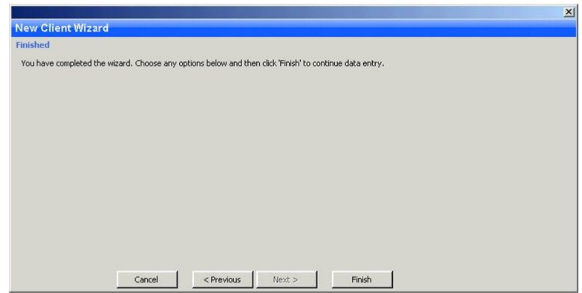


6. Click on the Admission Type and click on Next.

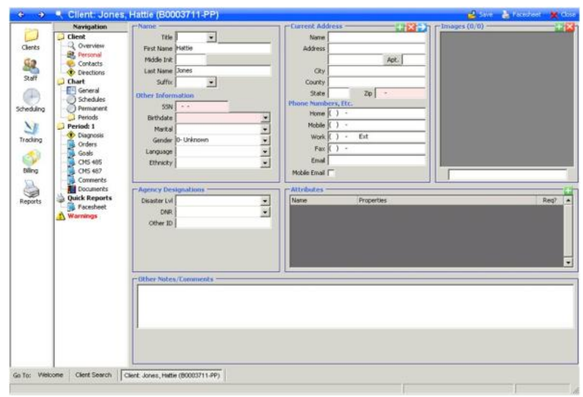
Admission Type



7. This is the last screen of the Wizard. You may click on < Previous to revise what you have entered. To finish the wizard click on Finish.



New EHR



After completing the wizard, the system will display the New Client's Electronic Health Record.