

Contents

Overview	1
Client is a Duplicate.....	1
Client is not attached to the correct Family	2

Overview

One of the most common errors with Client Intake is the entry of the Client’s family. This step is included in most workflows, but can be overridden and overlooked. This Quick Reference Guide provides some help with Client Families.

1. Find Client
2. Click on the Family Menu Item
 - a. Verify the Family Current Family
 - b. Check the Family Name
3. Click on Family Members Menu Item
 - a. Verify the number of family members
 - b. Verify the names of family members
4. Click on Current Family Menu Item
 - a. Verify the relationship to current family members
5. Determine if
 - a. The Client is setup correctly (do nothing, you are finished)
 - b. The Client is a Duplicate
 - c. The Client is not attached to the correct family

Client is a Duplicate

Action

1. Find Client
2. Mark Client for Deletion
 - a. Click the Edit Client Menu Item
 - b. Change the Last Name to start with DELETE
 - i. Example – “DELETE Smith”

For Support, Please

Submit a ticket in the HMIS
Email us at: hmis@computerhelp.biz
Contact us at (850) 651-0341
Contact us at (850) 259-4164

Revision

June 30, 2011

Okaloosa Walton Continuum of Care

HMIS

Client is not attached to the correct Family

Action

1. Find Client
2. Click on the Family Menu Item
 - a. Click on Add New Family
 - b. Search for existing Family by Family Name
 - i. If Found, Select existing Family
 - ii. If Not Found, Click to Add New Family
 1. Enter Data and Save

For Support, Please

Submit a ticket in the HMIS
Email us at: hmis@computerhelp.biz
Contact us at (850) 651-0341
Contact us at (850) 259-4164

Revision

June 30, 2011

Okaloosa Walton Continuum of Care

HMIS