

## Client Profile (v.1)

The *Profile* section has five areas: *Client Profile*, *Additional Profile*, *Households*, *File Attachments*, and *Infractions*. **Note: When updating a client be sure to periodically save your changes.**

### Client Profile:

Client Profile

Card Orientation: 1 | Issue ID Card | Save Changes | Exit

Added to System: Jun 1 2007 03:51PM

First: Just MI A Last: Test Suffix:

SS#: 999 - 99 - 9999

SSN Data Quality: Full SSN Reported (HUD)

Age:

### Additional Profile Information:

Complete and/or verify the client demographics. You can complete the *Emergency Contacts* section by clicking on **Add**.

Additional Profile Information

Save Changes

Assessment Date: 08/22/2007 11:03 AM | Back Date

Date of Birth: 05/12/1958 (mm/dd/yyyy) H G

Gender: Male H G

Primary Race: White (HUD) H G

Secondary Race: Asian (HUD) H G

Ethnicity: Other (Non-Hispanic/Latino) H G

Contact Information

Emergency Contacts | Add

Contact's Name	Phone Number	Second Phone Number	Relationship to Client
No Record Sets			

Show Entire List In Window

Email Address: H G

### Households:

If you are serving a family you will need to create a household for the client and his/her family.

- Click **Add this client to Household**.

Households Containing Just A. Test | Add this client to Household

Household Type	Clients in Household	Relationship to Head of Household	Date Entered	Date Removed	Head of Household
No Households found for this client.					

- Complete the client's household information and click on **Start NEW Household**.

Add Client to Household - (Just A. Test)

Household Type (if starting new household): Male Single Parent

Head of Household: Yes

Relationship to Head of Household: Self

Date Entered: 08/22/2007 (mm/dd/yyyy)

Date Removed: (mm/dd/yyyy)

Start NEW Household | Add to EXISTING Household | Cancel

- c. The *Add Clients To Household* section will display. Enter the next household member's name and SSN.

**Add Clients To Household - (Just A. Test)**

Overview - Type: Male Single Parent, Current Members: 1 Removed Members: 0 Edit Household Type

Name	Relationship	Date Entered	Date Removed	Head of Household
▶ Test, Just A (#137)	Self	08/22/2007		Yes

**Add Additional Clients to Household**

"Search for Client" before adding a new client.

First  MI  Last  Suffix

SS#  -  -

Search Filter  Exact Match?

**Client Demographics**

Information contained in the following fields will be carried forward to the next screen and is also used when adding a client.

SSN Data

Quality

Date of Birth  (mm/dd/yyyy)

Gender

Primary Race

Secondary Race

Ethnicity

- d. Click on **Search For Client**. The screen will refresh and may display a list of clients that are possible matches for the client you entered.
- If there is a match, click the name of the client who matches your search.
  - If there is no match, complete the household member's demographics section and click on **Add Client With This Information**.
- e. Complete the household relationship data and click on **Add Household Member**.

**Add Clients To Household - (Just A. Test)**

Overview - Type: Male Single Parent, Current Members: 1 Removed Members: 0 Edit Household Type

Name	Relationship	Date Entered	Date Removed	Head of Household
▶ Test, Just A (#137)	Self	08/22/2007		Yes

**Continue Adding Household Member**

Client

Head of Household

Relationship to Head of Household:

Date Entered  (mm/dd/yyyy)

Date Removed  (mm/dd/yyyy)

- f. You can continue to add household members or click on **Exit** and return to the *Profile* screen. The household will now reflect the number of clients you've added.

**Households Containing Just A. Test** Add this client to Household

Household Type	Clients in Household	Relationship to Head of Household	Date Entered	Date Removed	Head of Household
▶ Male Single Parent	2	Self	08/22/2007		Test, Just A.

**File Attachments:** Used for additional documentation or a photo used for identification cards etc.

**File Attachments** Add New File Attachment

Date Added	Name	Description	Type	Provider
		None.		

**Infractions:** Used to track rule breaking and problem issues with the client.

**Infractions for Just A. Test** Add new infraction to Client

Banned Start	Banned End	Infraction	Ban Code	Provider	Sites	Staff
No Infractions found for this client.						