

Creating a Client

When you open ClientPoint, you will see the Client Search page, which has three primary sections. Section A allows you to search for an existing client or create a new client, Section B allows you to jump straight to a client's profile if you know their ID number, and Section C shows the list of clients resulting from a search (Section C does not appear until you perform a search).

Before creating a new client, always check to see if their file already exists. Start by entering their first and last names into the appropriate boxes and clicking on Search. If your client appears in Section C, click on their name to go to their profile.

The screenshot displays the 'Client Search' interface, divided into three sections:

- Section A:** A search form titled 'Client Search' with a warning: 'Please Search the System before adding a New Client.' and a note: 'Items in Italics are for Data Entry ONLY and will not be used for Search Results.' The form includes fields for Name (First: Jill, Middle, Last: Testclient, Suffix), Name Data Quality, Alias, Social Security Number, Social Security Number Data Quality, U.S. Military Veteran?, Exact Match, Date of Birth, DOB Data Quality, Gender, Primary Race, Secondary Race, and Ethnicity. Buttons at the bottom include Search, Clear, Add New Client With This Information, and Add Anonymous Client.
- Section B:** A section titled 'Client Number' with the instruction 'Enter or scan a Client ID number to go directly to that Client's profile.' It features a 'Client ID #' input field and a 'Submit' button.
- Section C:** A table titled 'Client Results' with columns: ID, Name, Social Security Number, Date of Birth, Alias, Gender, Banned, and Household Count. The table currently shows 'No matches.'

It is possible that a client's name was originally misspelled or has changed, so it is important to always do a second search with the social security number (if the client has one and is willing to provide it). If a client appears in the search that looks like it may be correct, always verify the date of birth using client-provided information. If no results appear, it is time to create a client.

See the following page for notes on how to handle specific cases. Complete all fields with proper capitalization and click "Add New Client With This Information." You have created a client!

Notes on Specific Fields

Name	First Jill	Middle E	Last Testclient	Suffix	
Name Data Quality	Full Name Reported			Date of Birth	01 / 01 / 2000
Alias				DOB Data Quality	Full DOB Reported (HUD)
Social Security Number	123	- 45	- 6789	Gender	Female
Social Security Number Data Quality	Full SSN Reported (HUD)			Primary Race	Client refused (HUD)
U.S. Military Veteran?	No (HUD)			Secondary Race	-Select-
Exact Match	<input type="checkbox"/>			Ethnicity	Hispanic/Latino (HUD)

1. Collecting the client's middle initial is adequate for the middle name field
2. Information on race, gender, and ethnicity cannot be collected through staff observation
3. If a client self-identifies as transgender, ask whether they want that recorded or if they simply want their gender to be recorded (i.e., do they want their gender recorded as "Trans Female (MTF or Male to Female)" or simply as "Female")
4. HMIS uses HUD race and ethnicity categories, meaning Hispanic/Latino is listed under Ethnicity instead of under Race. If a client self-identifies as Hispanic/Latino/Latinx, ask them if there is anything else they want recorded. If they say no, record their primary race as Client Refused and their ethnicity as Hispanic/Latino.
5. The field for secondary race is optional. If they do not identify with more than one race, leave this field blank.
6. No client should be prevented from accessing services because they do not want to provide a social security number. If the client does not provide a social security number, leave that field blank and select Client Refused/Client Doesn't Know from the Social Security Number Data Quality dropdown as appropriate. This process is the same for clients that do not know their social security numbers, those that don't have social security numbers, and those that simply do not wish to provide their social security numbers.
7. If a client provides only the last four digits of their social security number, select Approximate or Partial SSN Reported from the Social Security Number Data Quality dropdown.
8. The full date of birth should almost always be collected, with Full DOB Reported in the Date of Birth Type field. The rare exception to this is when the date of birth is not known but the age is known; in these cases, enter January first of the year that would make the client the correct age and select Approximate or Partial DOB Reported in the Date of Birth Type field.