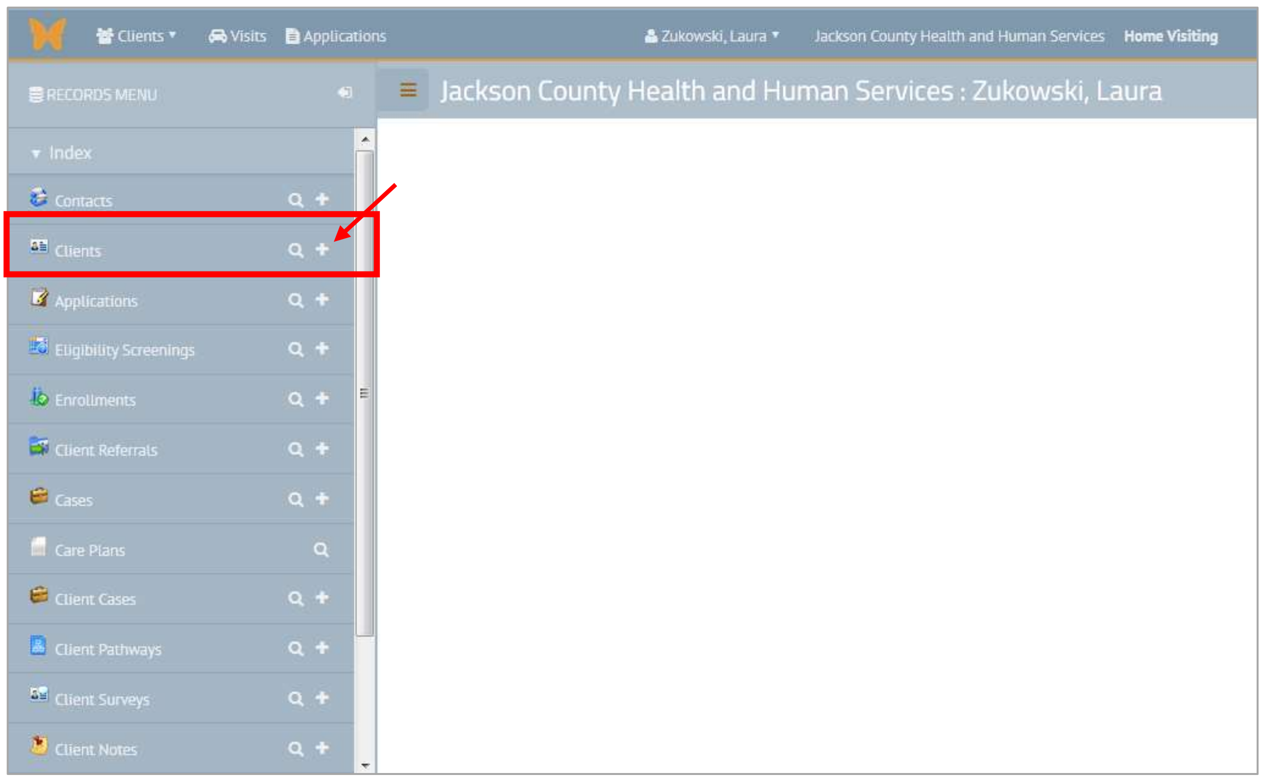
THEO Database: How to Add a New Client

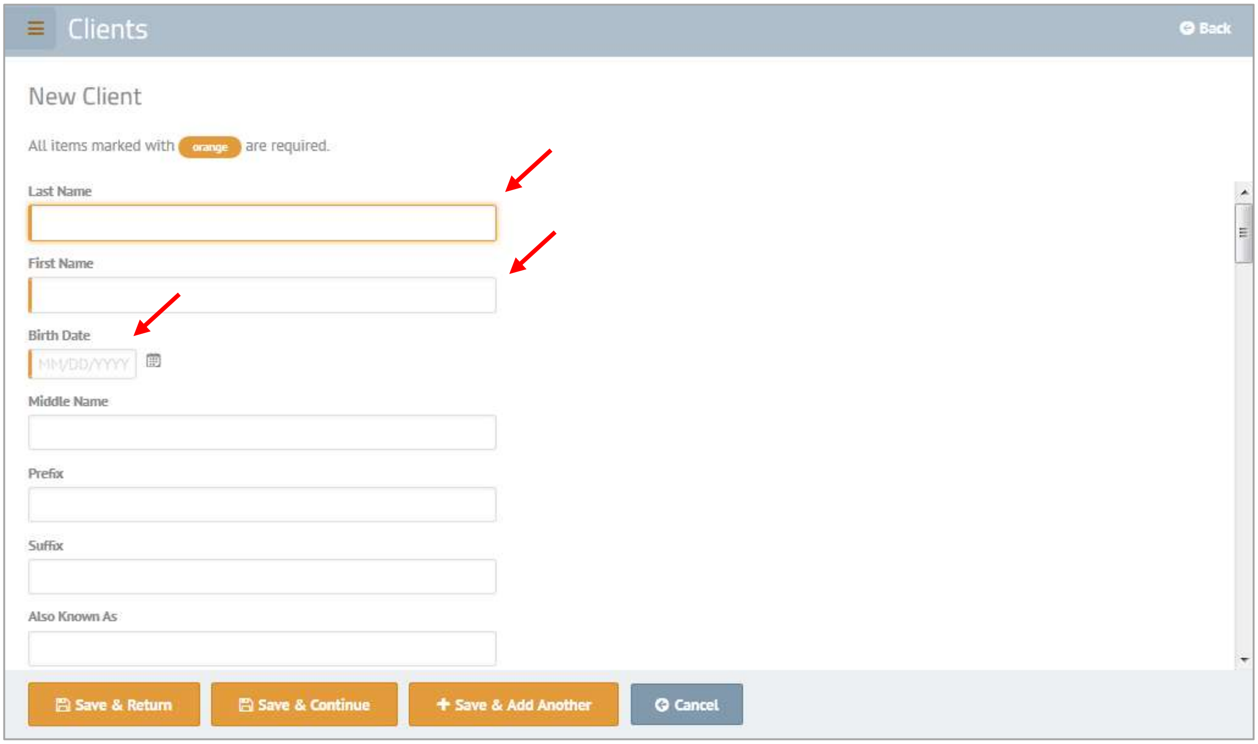
These instructions show how to create a new client record.

Go to https://oregon.vistalogic.net/Clara

Log in using your e-mail address as your user name and the password you created. (If you are already logged in, simply click on the orange butterfly in the top left area of your screen to go to your HOME screen.)



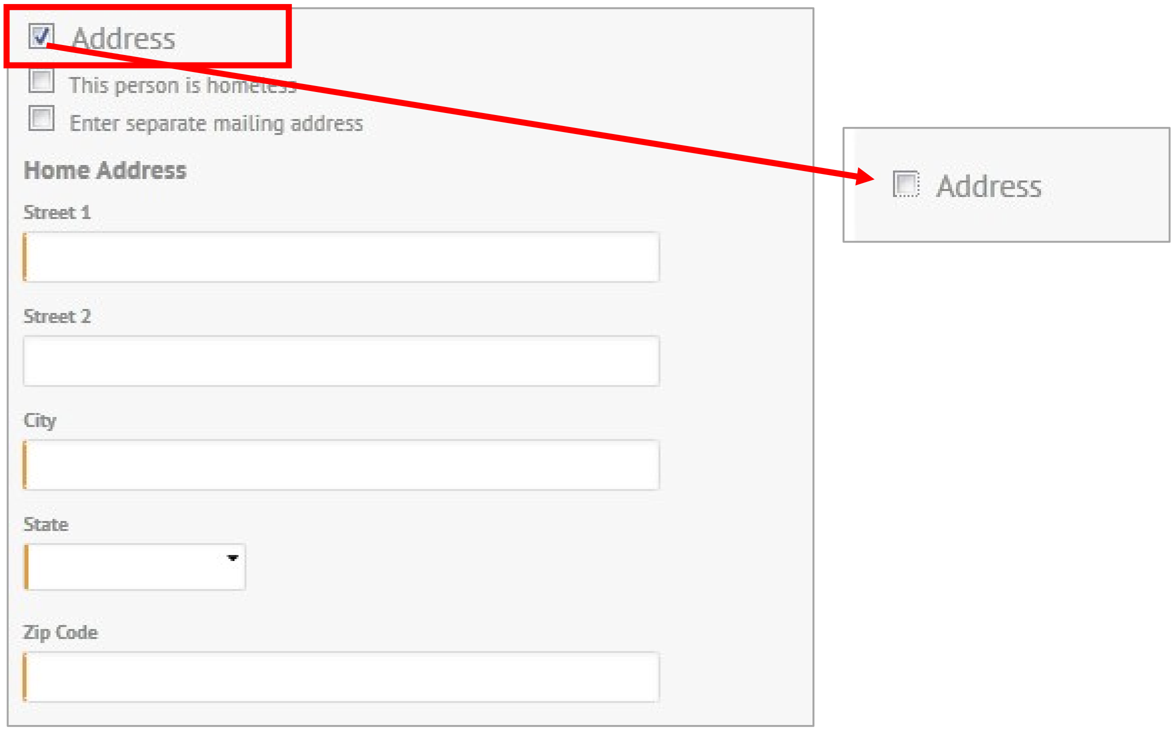
Your HOME screen opens. In the “Records Menu” on the left side of your screen, click on the “+” (plus symbol) to the right of “Clients”.



The “New Client” screen opens. Fill in the data fields with your client’s information. Any field that has an orange bar to the left of it is required. You won’t be able to save the record unless you enter data in every field that has an orange bar.

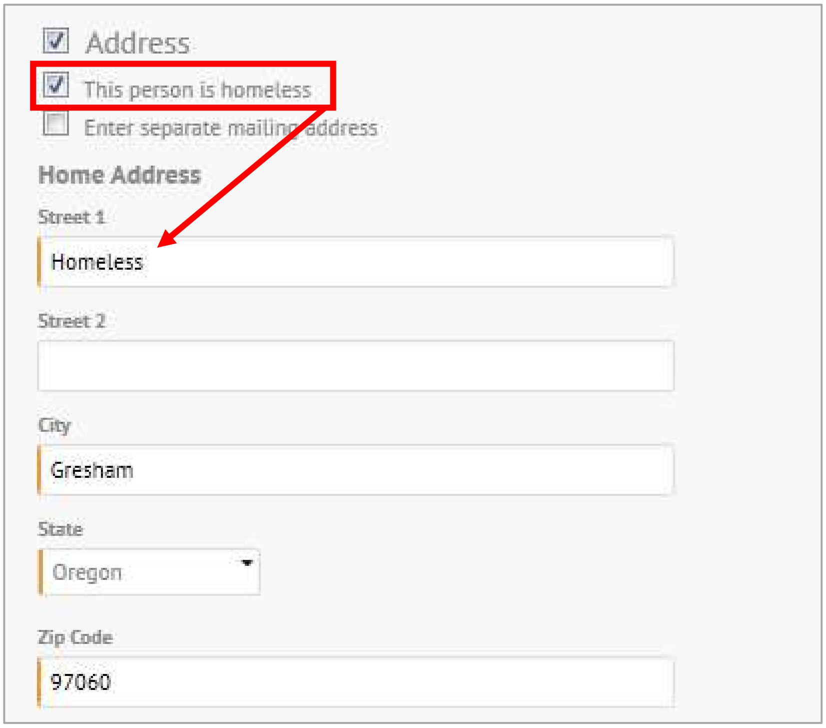
The “Birth Date” field requires you to enter a birth date in order to save your data entry. The birth date must be typed in the MM/DD/YYYY format.

Check <u>all</u> races that your client reports to you.

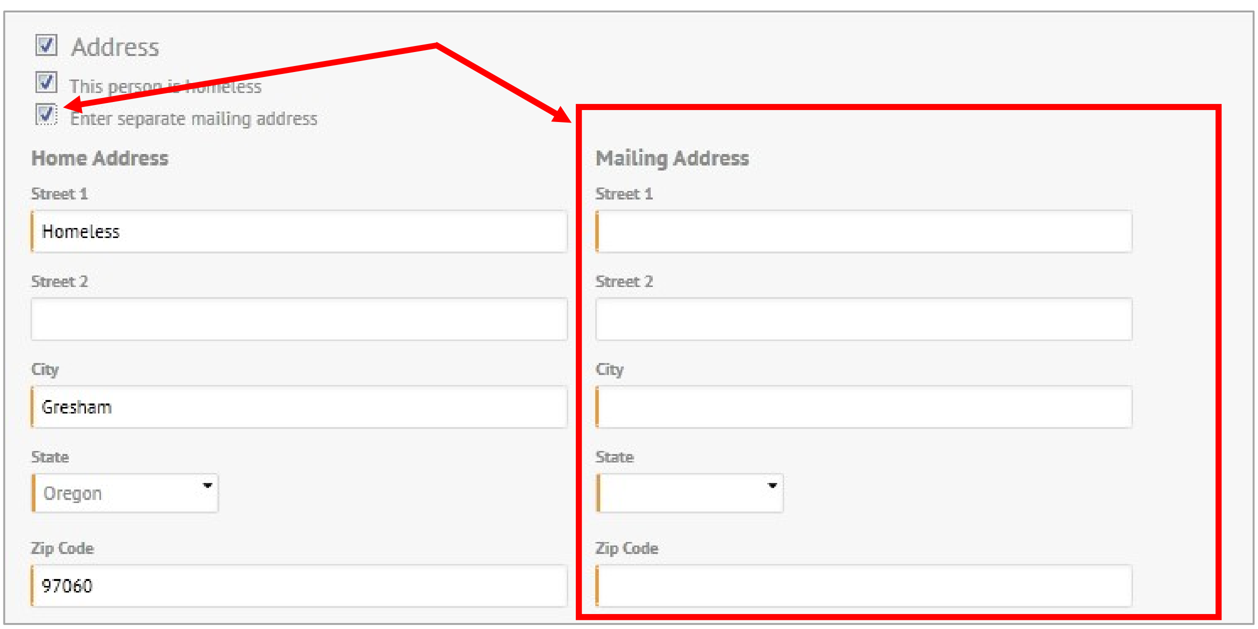


You are required to enter data in the “Address” fields before you can save. If you don’t know the client’s address, click on the checkmark to the left of the “Address” field. That will close the set of address fields and allow you to save all your other entry on the screen without recording an address.

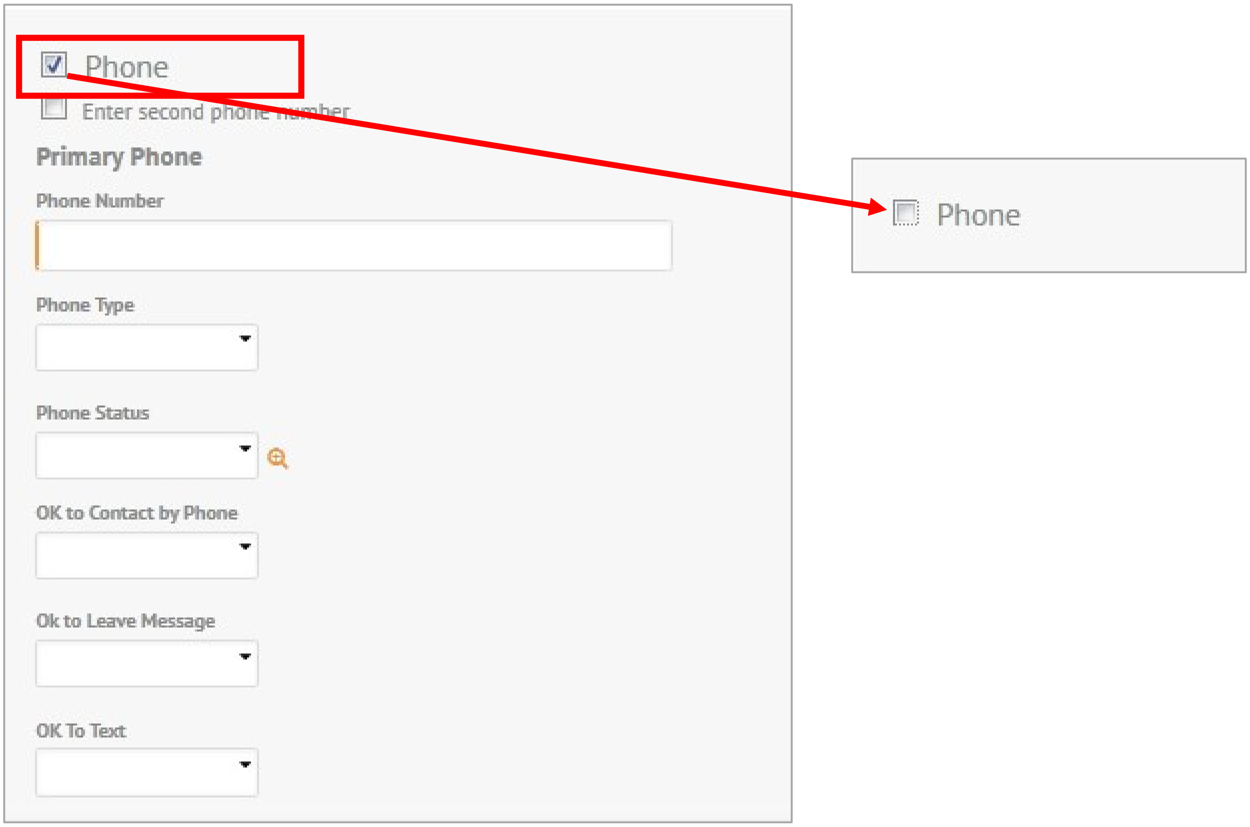
At a later time, you may enter the client’s address. Click on the “Address” field to add a checkmark to the field. The set of “Home Address” fields will appear again on the screen and you may enter your client’s address.



If your client is homeless, check the "This person is homeless" checkbox. "Homeless" will appear automatically in the "Street1" field. You will be required to enter a city, state, and zip code before you can save your entry.

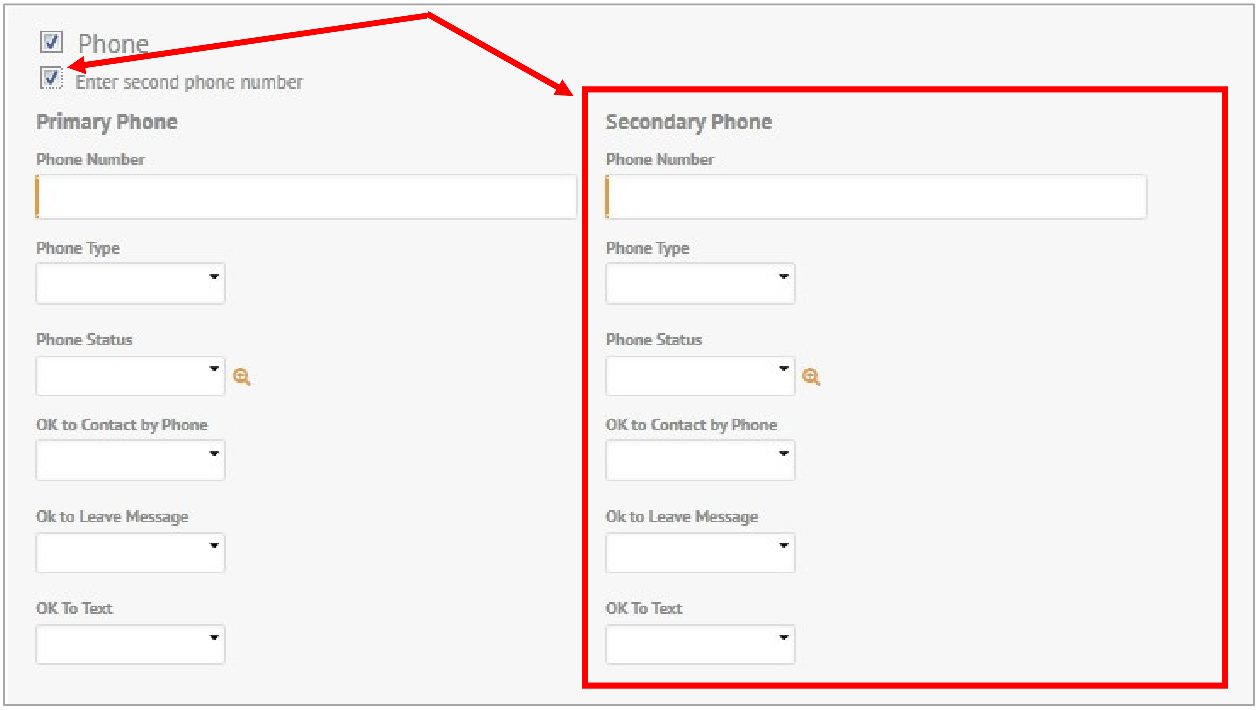


To enter a separate mailing address, click on the "Enter separate mailing address" checkbox. A new set of fields open to the right of the "Home Address" fields. To remove a mailing address, click on the "Enter separate mailing address" checkbox to remove the checkmark. The "Mailing Address" fields disappear.

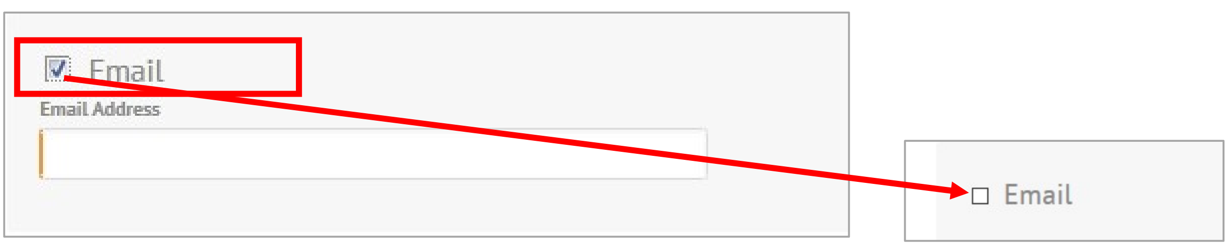


You are required to enter data in the “Phone Number” field before you can save. If you don’t know the client’s phone number, click on the checkmark to the left of the “Phone Number” field. That will close all the address fields and allow you to save all your other entry on the screen without the address.

At a later time, you may record the client’s phone number. Click on the “Phone Number” field to add a checkmark to the field. The set of phone number fields will appear again on the screen, and you may enter your client’s phone information.

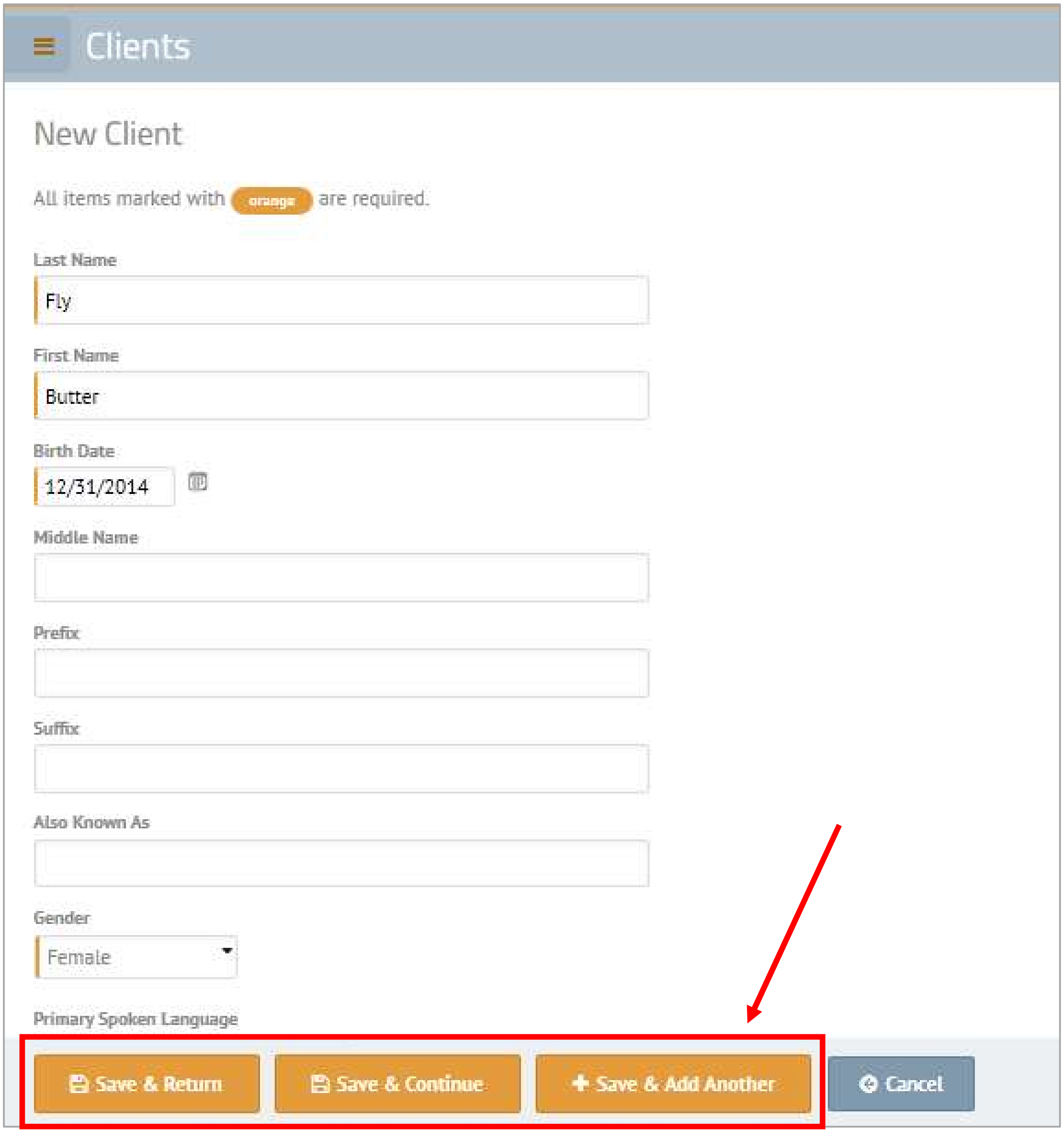


To enter a second phone number, click on the “Enter second phone number” checkbox. A new set of fields open to the right of the “Primary Phone” fields. To remove the second set of phone number fields, click on the “Enter second phone number” checkbox to remove the checkmark. The fields for the second phone number disappear.



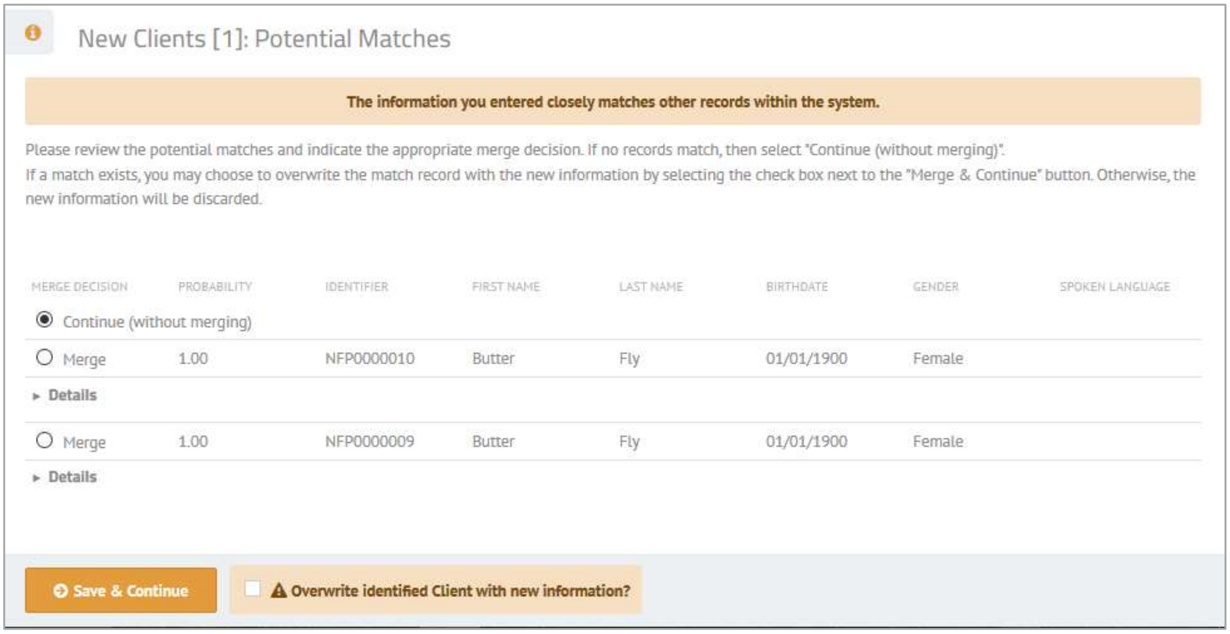
You are required to enter data in the “Email” field before you can save. If you don’t know the client’s Email address, click on the checkmark to the left of the “Email” field. That will close the “Email Address” field and allow you to save all your other entry on the screen without the Email address.

At a later time, you may record the client’s Email address. Click on the “Email” field to add a checkmark to the “Email” field. The “Email Address” field will appear again on the screen.



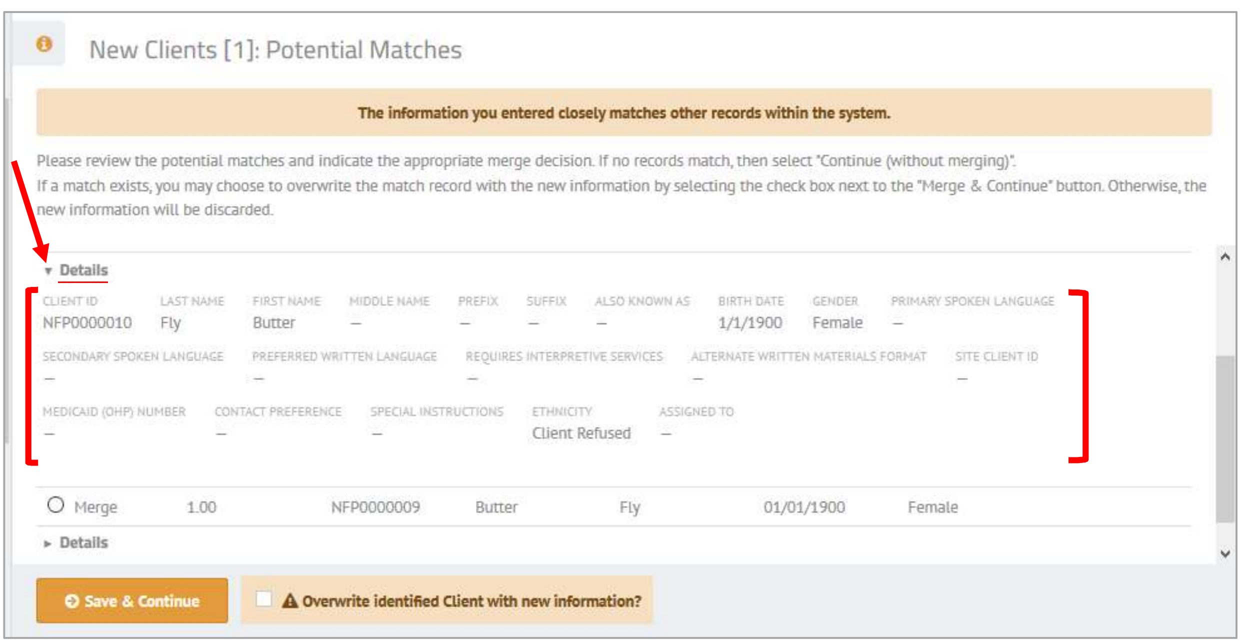
Save your entry by clicking on one of the orange "Save" buttons.

- The "Save & Return" button returns you to the HOME page.
- The "Save & Continue" button takes you to the "Client" screen, which summarizes information about your client and provides navigation links to other modules. The many links on this screen allow you to view information about your client and to open new screens where you can enter information.
- The "Save & Add Another" button takes you to a blank "New Clients" screen where there is a new set of data fields for entering another client.

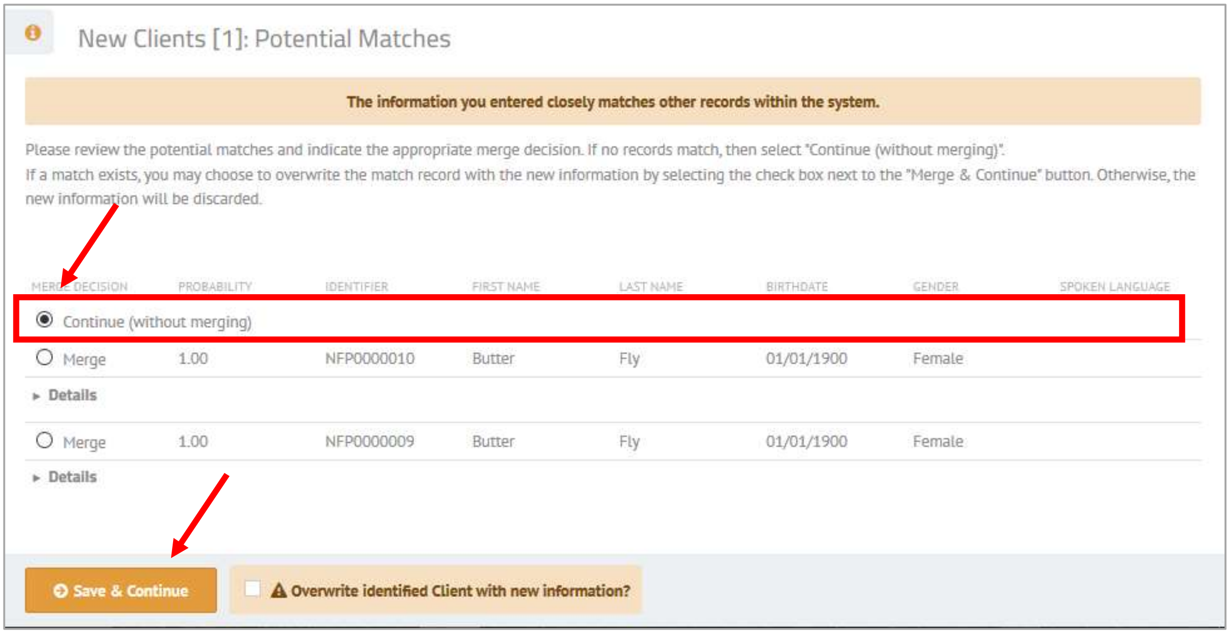


Before saving a new client record, THEO always checks whether your client exists already in the database. This prevents duplicate client records from being created.

Sometimes after you click to save your new client record, an extra screen appears that asks you to look at one or more existing client records to decide if you are trying to save a duplicate record. On the screen above, THEO has found two records that might match the client record that was entered.

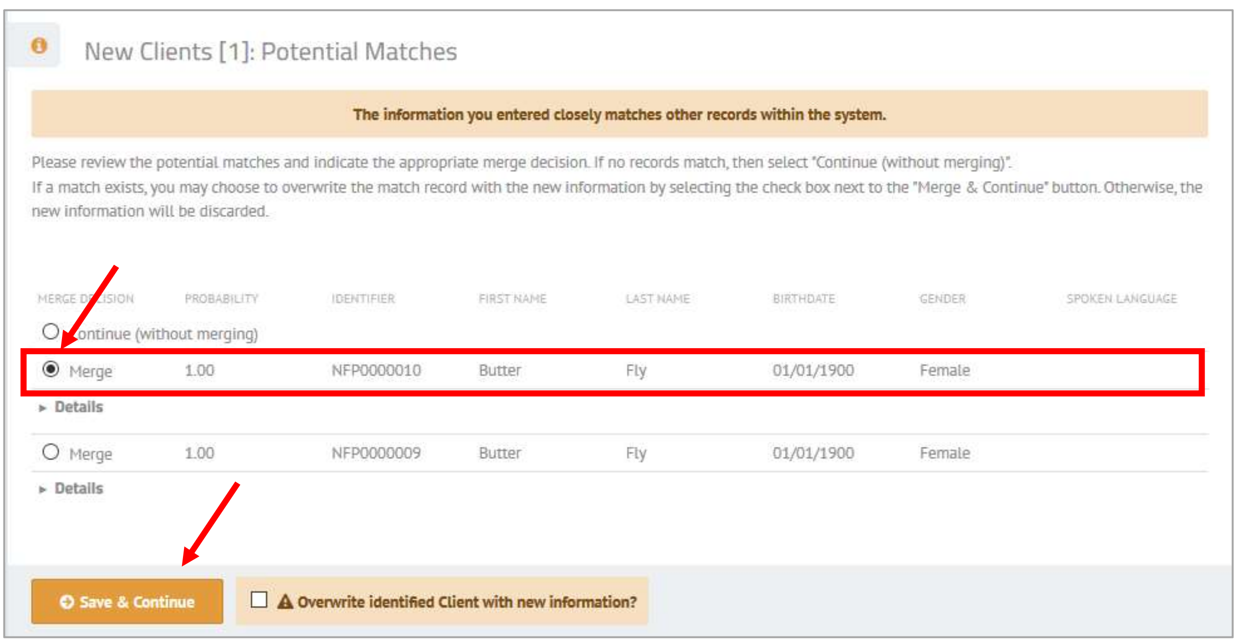


To see more detailed information about a possible match, click on the tiny triangle to the left of the heading "Details". More data fields open to show you more information.

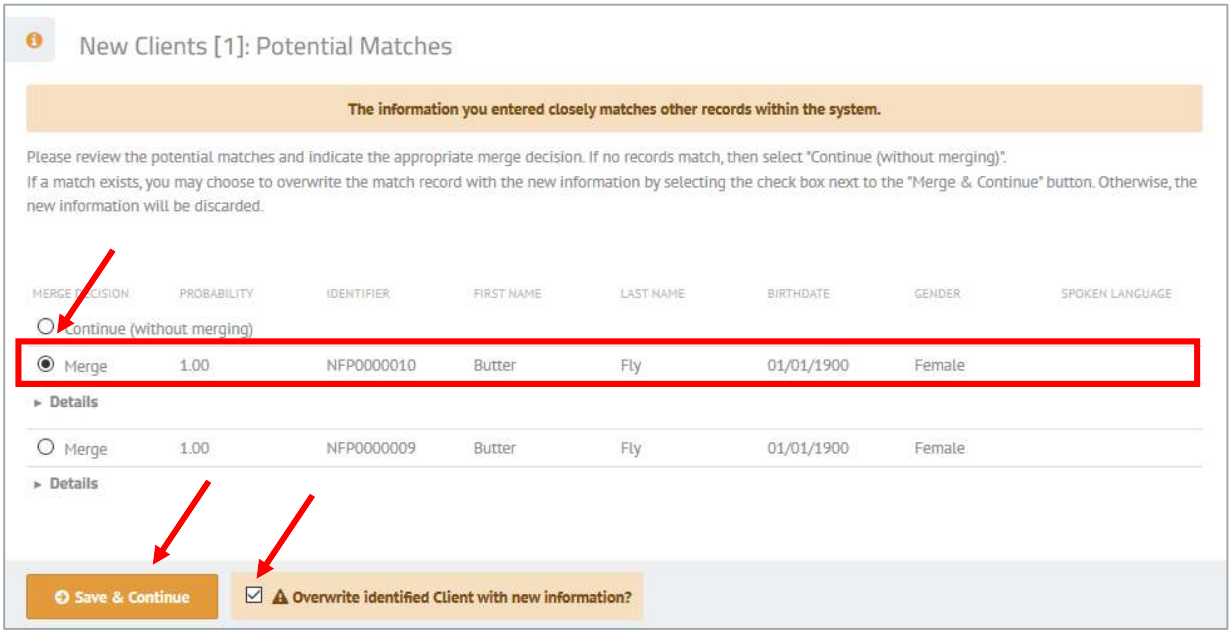


On the screen above, you are presented with multiple choices.

You may continue and save your new client record by leaving the black circle in the radio button to the left of "Continue (without merging)" and clicking on the "Save & Continue" button. Your new client record will be created in addition to the other two existing records with the same client name, birthdate, and gender.

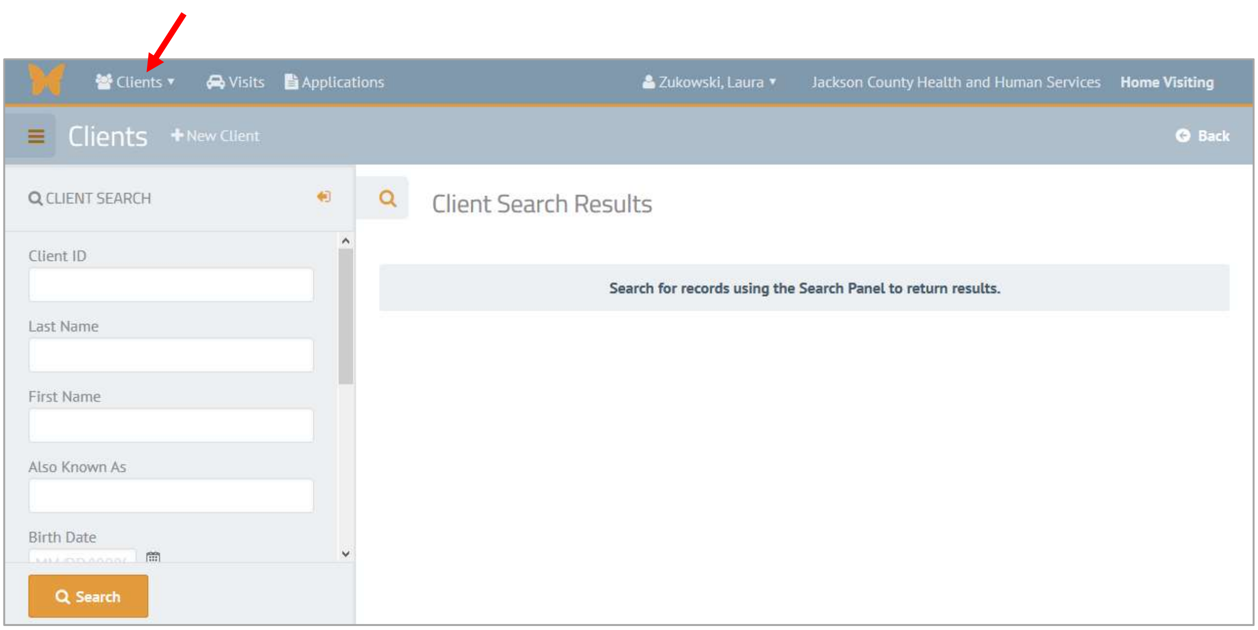


You may merge your new client record with one of the existing client records. Click on the radio button to the left of the client ID and name. Click on the "Save & Continue" button. The information on the existing client record will be saved instead of the new information you entered. You will begin recording information on the existing record. A new client record is not created.

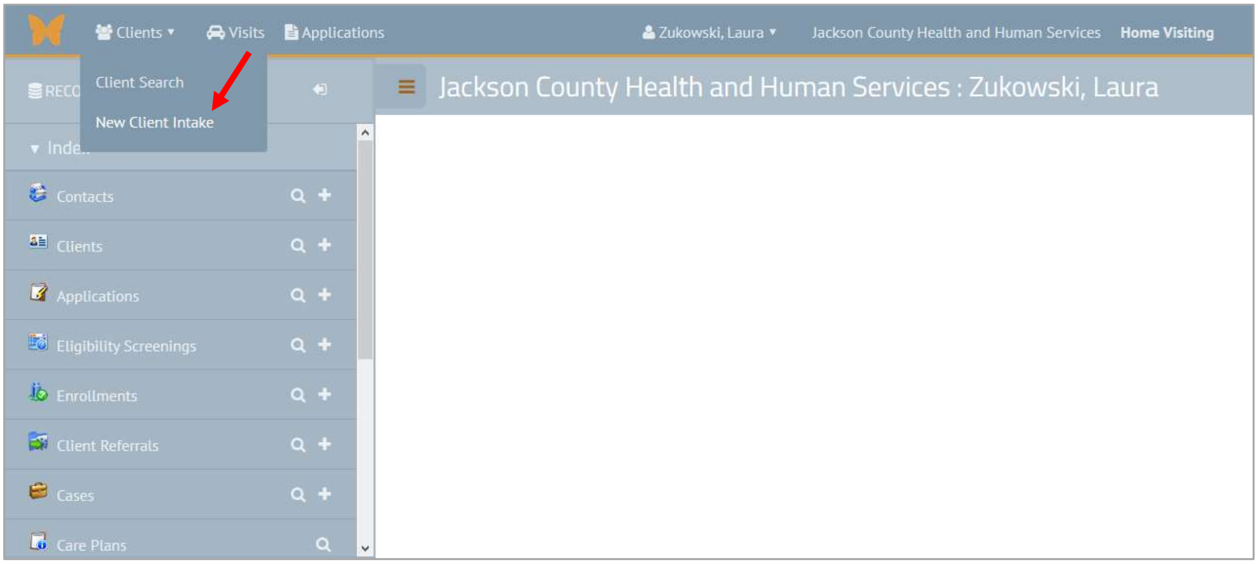


Or, you may merge your new client record with one of the existing client records and update information on the old record. Click on the radio button to the left of the client ID and name. In addition, place a checkmark in the "Overwrite identified Client with new information?" checkbox. Click on the "Save & Continue" button.

The information you entered in the new client record saves on the old client record. You will begin recording information on the old existing record, which contains the updated information you recorded.



If you wish to enroll your client, hold your cursor over "Clients" in the page header.



A menu opens. Click on "New Client Intake". You will be led through a series of screens to enroll your client. Follow these prompts. At the end of the "New Client Intake" process, your client will be enrolled and new parts of the client's record will be created. For example, the schedule of when screenings are due will be created for your client.