How to Add a New Client

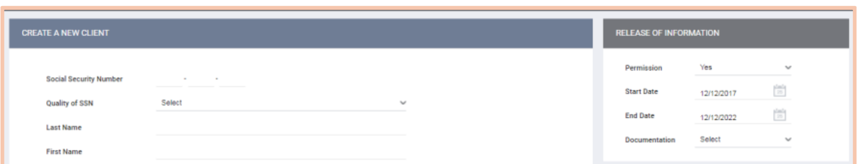
If you are unable to find the client, you may add a new client from the client search screen, using the add client function. 

Before adding a client profile, make sure you have the client sign your agency's paper Release of Information (ROI). Complete **ALL fields on the Intake screen with the proper response and attach your agency paper ROI. Click "Add Record" at the bottom of the page when you are finished. All fields **REQUIRE** complete data.

**If any of the required HUD Universal Data Elements have been left blank then you will not be able to save/create the file. These fields will be highlighted in red for your attention.

**Complete the missing fields and click "Add Record" to create the file.

Add the ROI from the dialogue on the upper-right hand side of the "Create a New Client" screen (REQUIRED**):



- If the client does not consent, select **Permission: 'No' and make the client profile "Private" by clicking on the privacy shield.**
- Otherwise, you can affirm approval by:
  - Signed Paper Document
  - Uploading a PDF of an ROI
- Most data elements include a "Client Doesn't Know" or "Client Refused" response category. These are considered valid responses if the client does not know, or the client refuses to respond to the question. It is not the intention of the federal partners that clients be denied assistance if they refuse or are unable to supply the information.
- However, some information may be required by projects or public or private funders to determine eligibility for housing or services, or to assess need services.
- The "Client Doesn't Know" or "Client Refused" responses should not be used to indicate that the case manager or data entry person does not know the client's response, response category "Data Not Collected" must be used. In such cases, that response category will be treated as missing data for reporting purposes.

ADDING A CLIENT WHO DOES NOT CONSENT

If your client does not feel comfortable sharing their identifying information per the ROI guidelines, please create an anonymous profile for them. This is a profile which does not contain any information that can specifically identify them as an individual (birthday, SSN, etc.). Demographic information such as race, ethnicity, and often veteran status do not necessarily reveal their identity within the community.

Select ROI Permission to "NO" and toggle Consent Refused button to hide client personal information: