ADDING CLIENTS

Add client workflow (for Program Administrator - PA)

1. Clinician goes to their PA, needs 5 clients in this Ucode
2. 3 are found in either:
   a. Active Client list = PA assigns to the Clinician
   b. Discharged Client list = PA needs to click ReEnroll
      i. PA then associates client to that Clinician
3. 2 not found = PA can add (Add Client function)
   a. PA then associates client to that Clinician

Add client workflow (for Clinician – CLI)

1. Clinician is missing 5 clients in this Ucode
2. during the Add Client function, the system finds 3 clients and the message flashes “Match...” = CLI adds
3. during the Add Client function, the system message flashes “No Match...” = CLI does not add
   a. CLI will go to PA (to avoid potential duplicate)
   b. PA will follow PA workflow above (#2 and #3)
      i. 1 is found in either:
         1. Active Client list = PA assigns to the Clinician
         2. Discharged Client list = PA needs to click ReEnroll
            a. PA then associates client to that Clinician
      ii. 1 not found = PA can add (Add Client function)
         1. PA then associates client to that Clinician
ADDING CLIENTS

Add client workflow (for PA / CLI)

1. When in the add client page, you entered all the pertinent information, then it goes to a different page saying “Server Error in...” (example below)
2. Do not delete the page, please remember to screen shot it, then email Decision Support the screen shot with descriptions of what you were doing
3. Do not send client information / Decision Support will call you to gather such information later to accurately fix the problem
4. Once resolved, Decision Support will contact you