

Creating a New Client ID Tip Sheet

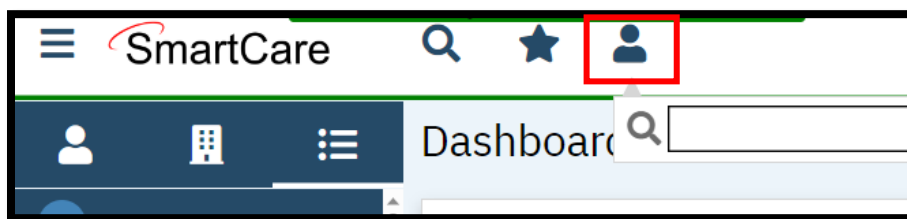
This Tip Sheet will walk users through how to create a new client ID in SmartCare. This process is intended for agencies that do not use the Inquiries screen. If your agency completes inquiries please see the Provider Inquiry Tip Sheet. This Tip Sheet may change as our trainings and systems are updated. Please visit our website [BHS EHR \(saccounty.gov\)](http://BHS EHR (saccounty.gov)) for the most updated version. If any additional help is needed, please contact us at bhs-ehrsupport@saccounty.gov.

How do I know I need to create a new client?

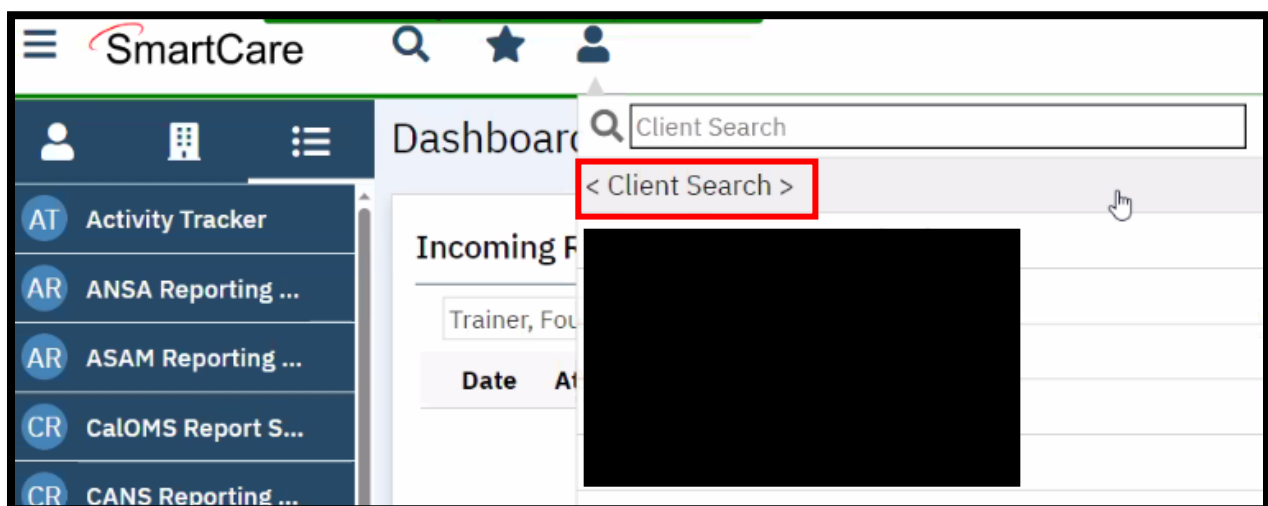
When enrolling the client into your program by using “Client Programs (Client)”, if the client is not populating when you search for them, you will need to create a new client ID.

How to Add a Client to SmartCare

1. Click on the “Client Search” icon.



2. Click on “Client Search”. If you click on the search bar or anywhere outside of it that option will go away. If that happens click on the “Client Search” icon again to bring it up.



- 3. Enter the clients last and first name and click "Broad Search". If no one matches that description you'll get a message saying "No Search Records Found". If there is a close match they will be listed below. If you do not see your client listed move on to step 4. If you do see your client you select them.

Clear ✖ No Search Records Found

Name Search Include Client Contacts Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search **Narrow Search** Type of Client Individual Organization

Last Name Lester First Name Summer Program ▼

Other Search Strategies

SSN Search **Phone # Search**

DOB Search **Master Client ID Search**

Primary Clinician Search ▼ **Client ID Search**

Authorization ID / # **Insured ID Search**

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
No data to display								

Create New Potential Client **Select** **Cancel**

Registration **Inquiry (Selected Client)** **Inquiry (New Client)**

- 4. Next, enter the SSN number and click the SSN Search button.

SSN Search

- 5. Enter the client's date of birth and click the "DOB Search" button.

DOB Search

- 6. After you've completed all three searches the "Create New Potential Client" button will open. Click on there to create the new client.

The screenshot shows the SmartCare search interface. At the top, there is a 'Clear' button and a red error message: 'No Search Records Found'. Below this is the 'Name Search' section with checkboxes for 'Include Client Contacts' and 'Only Include Active Clients (Checking will not allow option to create new Client)'. There are 'Broad Search' and 'Narrow Search' buttons, and a 'Type of Client' section with radio buttons for 'Individual' (selected) and 'Organization'. Search fields include 'Last Name' (Test), 'First Name' (Summer), and 'Program'. The 'Other Search Strategies' section contains buttons for 'SSN Search', 'DOB Search', 'Primary Clinician Search', 'Authorization ID / #', 'Phone # Search', 'Master Client ID Search', 'Client ID Search', and 'Insured ID Search', each with corresponding input fields. Below is the 'Records Found' section with a table header: ID, Master ID, Client Name, Chosen Name, SSN/EIN, DOB, Status, City, Primary Clinician. The table is empty with the text 'No data to display'. At the bottom right, a 'Create New Potential Client' button is highlighted with a red box, along with 'Select', 'Cancel', 'Registration', 'Inquiry (Selected Client)', and 'Inquiry (New Client)' buttons.

- 7. Once the client has been created, you can enroll them into your program.