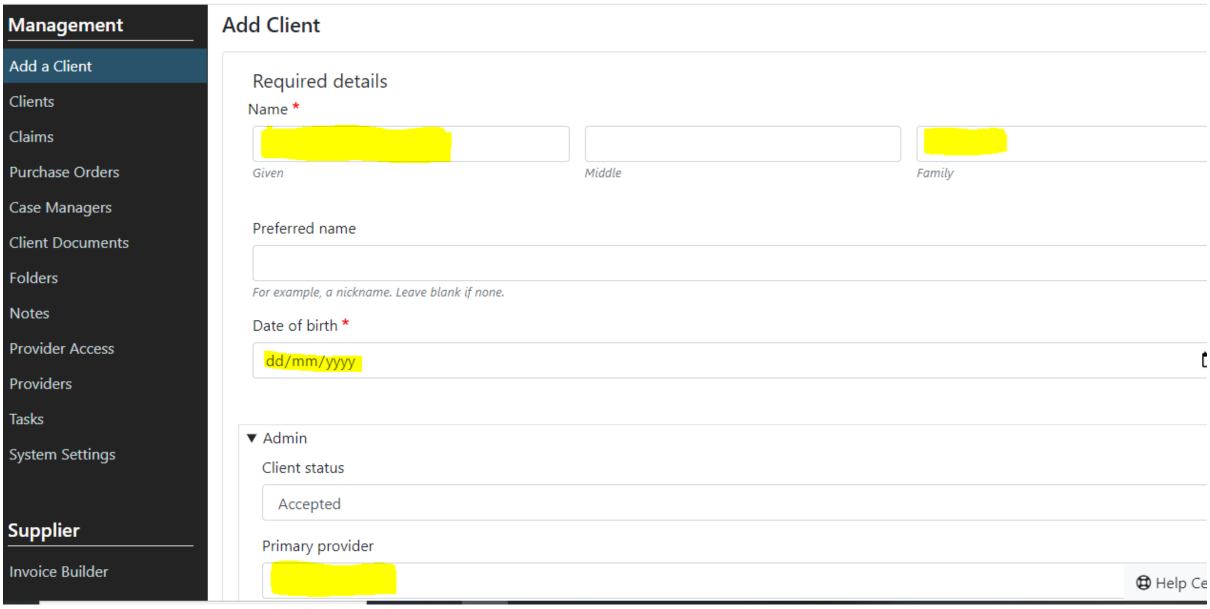
Client Management Systems

## How to  Add a Client CMS4

Note: only information with an asterisk * is mandatory (e.g., if you do not have the client's claim number you can still add the client)

- Click on Add a Client in the left hand Management menu




- Enter Name
- Enter Date of Birth
- Enter Name of Primary Therapist (start typing the name of your provider and choose from the dropdown options by clicking into the correct name.
- Enter Referral Source
- Write an intake note if appropriate
- Click CREATE CLIENT

Note: The client file can be edited after it is created and claim numbers are added after the client has been created.