



## 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

A screenshot of the "Add Client" form in the CMS4 system. The left sidebar shows a "Management" menu with "Add a Client" highlighted. The main form area is titled "Add Client" and contains several fields: "Name \*" with sub-fields for "Given", "Middle", and "Family"; "Preferred name" with a note "For example, a nickname. Leave blank if none."; "Date of birth \*" with a date format "dd/mm/yyyy"; "Admin" section with "Client status" set to "Accepted" and "Primary provider" field. A "Help Ce" button is visible in the bottom right corner.

- 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.