Client Intake Screen

Updated on August 2016

Home > **Client Management (Search Client)** > **Intake**

Business Purpose:

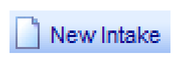
The Client Management – Intake page displays a tabular listing of the client's intake history records for both service and bed programs.

How to:

1. For each client intake history record, the intake **Program Name**, **Type**, **Created On**, **Created By**, **Status** and **Actions** are displayed.

2. Other than the **Actions** column on the table, each of the column headings are clickable and will execute a sort alternating between ascending and descending based upon the column heading. (For example, when you click on the **Created On**, the history records are then sorted in ascending order, the record with the oldest created date first.)

3. The Actions column shows whether the intake record is **View** only (non-active or expired) or can be **Update**d, and can be clicked to go to the detailed intake screen.

4. A new intake can also be started here by clicking on the 

action button.

Important Notes:

1. The total number of records is shown at the bottom of every page.

2. For intakes to program **Type** of Bed, the intake record **Status** can be active or inactive (expired).

3. For intakes to program **Type** of Service, the intake record Status can be active, inactive (expired), admitted or discharged.