Client Intake Screen

Updated on September 2023

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.

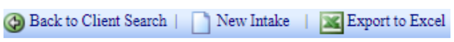
How to:

1. Click on the **Intake** Navigator. Client Management – Intake page will open.

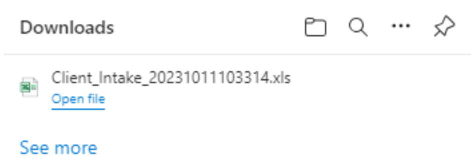
2. **Client No**, **Name**, **DOB**, **AGE** are displayed

Client Management - Intake					
Client No.	729650				
Name	One, Test	DOB	1996/09/09	Age	27

3. **Back to Client Search**, **New Intake**, **Export to Excel** buttons.



- **Back to Client Search** - returns you to the Search - Client Management page where the client search is performed.
- **New Intake** – starts a new intake and navigates you to the Client Management – New Intake page to select a program.
- **Export to Excel** – opens an Excel with client intake history records information



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

5. 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.)

6. 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.

Important Notes:

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

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

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