

CLIENT PROFILE required fields:

First Name	Last Name	Gender
DOB	SSN	Ethnicity
Races	Special Needs	Veteran Status
Address Type	Address Line 1	City
State	Zip	

Screen shots showing location of required fields on Client Profile.

Select the “Unknown” option for any field in which you do not have the information. Be sure to update the field once the information has been obtained.

Address Information

Address Type: Client Unknown Confidentiality: No

Address Line 1: Unknown

Address Line 2:

City: State: D Zip:

Cancel Finish

If you do not have the client's address, you may select "Client Unknown" from the Address Type drop down menu and enter "Unknown" on the address line. Enter the City and Zip code for the facility in which the assessment is being conducted. Be sure to update the client address once the information has been obtained.

INTAKE required fields:

Intake Facility (pre-filled)	Intake Staff (pre-filled)	Initial Contact
County of Residence	Source of Referral	Case Status (pre-filled)
Date of First Contact	Intake Date (pre-filled)	Pregnant (only if female)
Priority Population	Past IV Drug Use	Presenting Problem
Inter-Agency Service		

Screen shots showing location of required fields on Intake.

Intake Case Information for A. Dean

Intake Facility: Training Facility
 Intake Staff: Williams, Denise
 Initial Contact: Phone
 County of Res.: ADA
 Source of Referral: Felony Probation/Court

Case #1
 Case Status: Open Active
 Date of First Contact: 1/14/2011
 Intake Date: 1/14/2011
 Pregnant: Not Applicable
 Due Date:

Referral Contact: [Add Referral Contact Info](#)

Priority Population: Adult Problem Solving Court

HIV Tested?
 Past IV Drug Use: No

Presenting Problem (In Client's Own Words): Unknown

Inter-Agency Service: Child Protective Services (CPS), Developmental Disabilities, Domestic Violence, Faith-Based Services
 Inter-Agency Service Selected: Court/Legal Interface

Treatment Domains:
 Selected Treatment Domains: Substance Abuse

Date Closed: [Save & Close the Case](#)

[Cancel](#) [Save](#) [Finish](#)

Past IV Drug Use—Select “No” from the drop down menu if you do not know the client’s IV drug use status.

Presenting Problem—Enter “Unknown” if you do not know the presenting problem.

Inter-Agency Service—If the client has been referred for assessment by Drug Court or the assessment is being conducted in jail, select “Court/Legal Interface”.

Be sure to update the Intake once the correct information has been obtained.