# Add Client

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| **Purpose** | Add a new client record in CAREWare so demographic, clinical, service, and case-management information can be documented. |
| **Who should do this** | CAREWare users who are authorized to create client records in a provider domain. |
| **Use this guide when you need to** | Create a client record and review possible duplicate matches before completing enrollment or other client-level work. |
| **Main warning** | Review possible matches carefully to avoid creating a duplicate client record. |

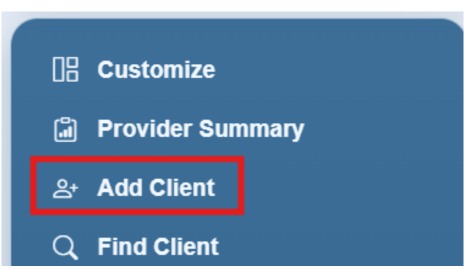
**Quick path**
Provider domain > Add Client > enter required demographic information > Add > review possible matches.

## Before you begin

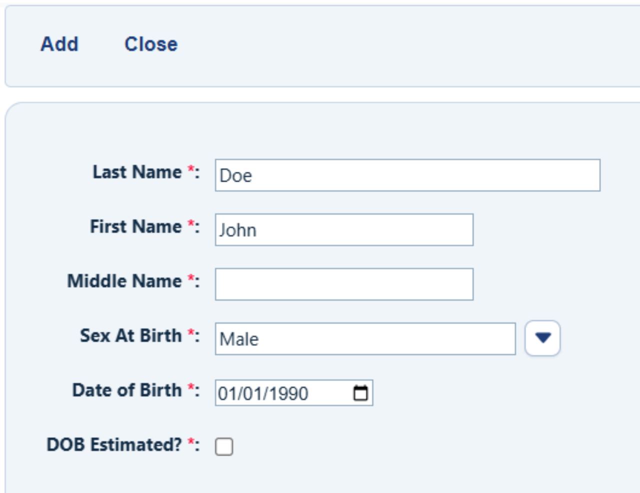
- Confirm that you are working in the correct provider domain.
- Have the client's legal name, sex at birth, and date of birth available.
- Search for the client first, and review all possible matches before creating a new record.

## Add a client

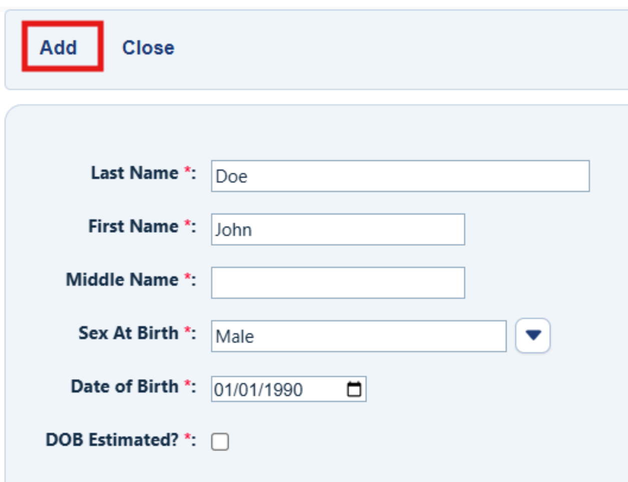
**Step 1.** Log into a provider domain and click *Add Client* in the left menu.



**Step 2.** Enter the client's last name, first name, middle name (optional), sex at birth, and date of birth. If the date of birth is unknown, enter an estimated date and check *DOB Estimated?*.




**Step 3.** Click *Add*.




## Duplicate client warning

If matches are found, CAREWare displays a list of potential matches. Review the list before deciding whether to add a new client or open an existing record.

## Choose an action for a possible match

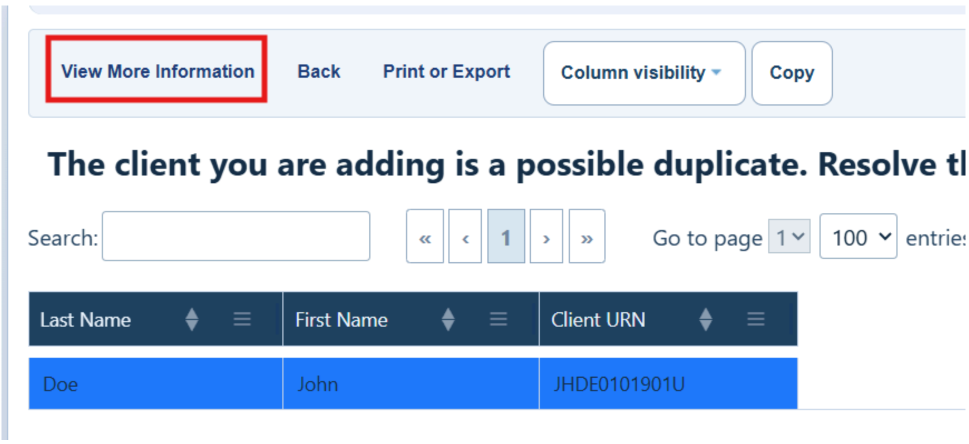
**View More Information:** Open the existing client record to determine whether it belongs to the same person.

**Back:** Return to the Add Client screen to review or correct the information entered.

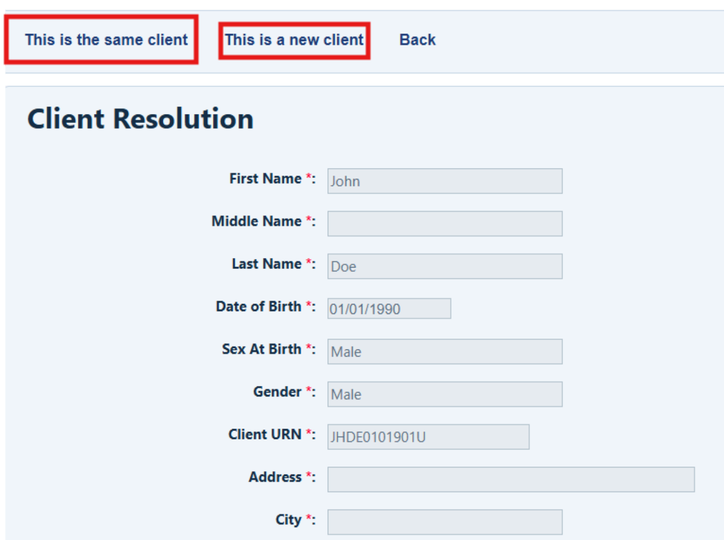
**Print or Export:** Print or export the list of possible matches.

**Column Visibility:** Add or remove columns from the possible-matches list.

**Step 4**: Select a record to verify if it is the same client or a different client.




Step 5: After reviewing the record, select *This is the same client* if the record under Client Resolution is the same client as the client being added Select *This is a new client* if the client being added is different from the one shown under Client Resolution.




## How to confirm it worked

**1.** The client record opens after a new client is added.

**2.** The client's identifying information appears in the record.

**3.** The new record is available from Find Client in the correct provider domain.

## Troubleshooting and common questions

### What if the client already exists?

Use Go To Client to open and review the existing record. Do not create a second record for the same person.

### What if I entered the wrong information?

Select Back from the possible-matches screen, correct the Add Client fields, and submit again.