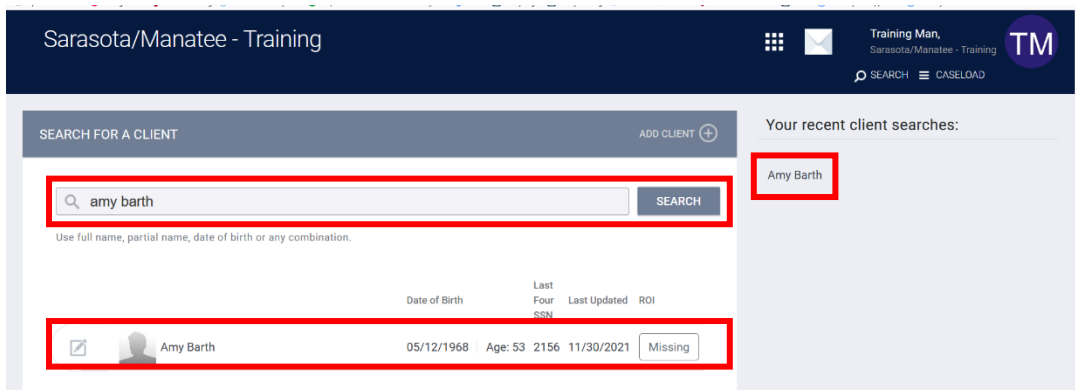


## Searching / Creating Clients

1. Login to Bit Focus
2. Search for Client – Existing Client

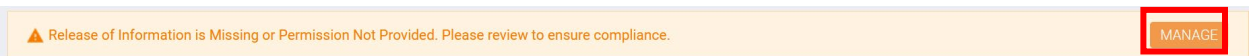
*Use full name, partial name, date of birth or any combination. Last 5 recent client searches will appear on the right side of screen. If your client is shown there, you can select by clicking on their name.*



*If client is in the system, he or she will appear below in the search box. If not, you will need to add client to the system.*

3. To select the client, hover your mouse over their name and click on the box with the pencil to the left of the client's name.

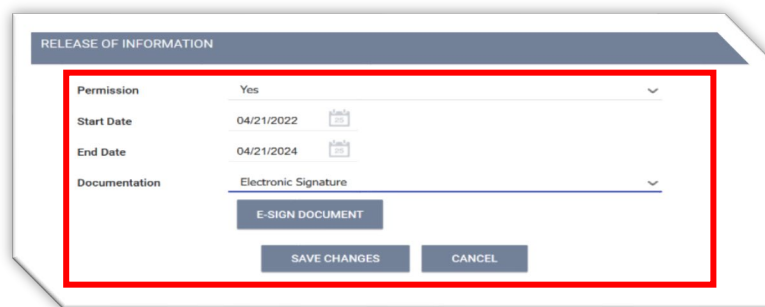
*The client demographic profile will appear. Review all information to ensure this correct. If client is missing a release of information, a warning will display across the top of the client's record. This will need to be completed before continuing.*



Select the manage button on the left of pop-up alert and add release of information.



4. Permissions, Start and End date pre-populate. Select documentation type.
  - a. If electronic signature is selected, click on E-Sign Document to have client sign.
  - b. If paper copy, select Attached PDF to upload. Click on **SAVE CHANGES** when complete.





## Searching / Creating Clients

1. Search for client using full name, partial name, date of birth or any combination.
2. If client does not appear, click on Add Client icon in the upper right corner of the screen.

*If you worked with the client in ServicePoint, do not create a new client. Please contact a member of the CSIS team to notify them of the issue.*

3. Complete all fields in the new client screen. Click on **ADD RECORD** when complete.

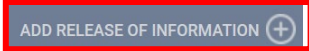
*These are HUD required fields for all clients entered into HMIS regardless of the program or funding.*

*Note: to the left side of screen, client may refuse to sign consent to share his or her data. However, this could limit his or her service options. Please provide client with Policy and Security Notice to help explain why this is needed. Copies of this should be posted and be available at all intake locations. Contact System Administrator if you need a copy of this form.*

4. Add Release of Information to clients record by click Manage



5. Select the manage button on the left of pop-up alert and add release of information



Permissions, Start and End date pre-populate. Select documentation type.

- a. If Electronic signature is selected, click on E-Sign Document to have client sign.
- b. If paper copy, select Attached PDF to upload. Click on **SAVE CHANGES** when complete.

A screenshot of a web form titled "RELEASE OF INFORMATION". The form contains the following fields:

- Permission: Yes (dropdown menu)
- Start Date: 04/21/2022 (calendar icon)
- End Date: 04/21/2024 (calendar icon)
- Documentation: Electronic Signature (dropdown menu)

Below the fields are three buttons: "E-SIGN DOCUMENT" (highlighted with a red box), "SAVE CHANGES" (highlighted with a red box), and "CANCEL".