Client Profile - Create, View, Edit, or Deactivate

Description: In this topic, the user will learn how to create a new client profile, and view, edit, or deactivate client profiles.

*Please note: Client profiles cannot be deleted, but the status can be changed to inactive.

Role Required: Super User

Permission Required: Client Admin

Required Entities Before Creation:

- Cost Center

Create Client

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Click **Actions**
5. Select **Add New Client**. Complete the form wizard.
    a. Basic Demographics tab:
        i. First Name **(required)**
        ii. Last Name **(required)**
        iii. Full Name (optional)
        iv. Address **(required)**: Client's physical address
        v. GNIS Code **(required)**: Click the blue **search location** link after entering the address. This will generate the GNIS Code.
        vi. Time Zone (optional): Select from drop-down
        vii. Phone **(required)**
        viii. *Alternate Phone (optional)
        ix. Mobile (optional)
        x. Email **(required)**: If EVV will be used, a valid and unique email address for the client must be entered.
        xi. DOB **(required)**
        xii. **Profile reference (optional)
        xiii. *SSN (optional)
        xiv. *Verify SSN **(required if SSN was entered)**
        xv. Allow SSN Retrieval: Yes or no options, default is no. If yes is selected, the SSN will be stored in a retrievable format for EVV aggregation. Only select yes if the funding source requires SSN to be aggregated.
        xvi. Attach Photo (optional): Required if facial recognition will be used for EVV
    b. Click **Next**
    c. Client Information tab:
        i. Client Id **(required)**: Unique Id usually provided by the funding source
        ii. Medicaid No (optional)
        iii. Insurance Group No (optional)
        iv. Insurance Plan No (optional)
        v. Insurance Payer No (optional)
        vi. Insurance Number (optional)
        vii. Certification Template (optional): Select if there are a set of certification requirements for employees working with this client
        viii. Cost Center **(required)**: Select the client's home cost center
        ix. Preferred Language (optional): Select the language spoken by the client
        x. *Received Date (optional): The date the client entered the company's services
        xi. *Packet Mailed (optional): The date the company completed and returned to the funding source all required documentation for the client to enter its services
        xii. Client Status: Defaults to active. Select inactive when no longer a client.
        xiii. Discharge Date (optional): Enter at time of the client's discharge
        xiv. Suspended Date (optional): Enter the date the client suspended services, i.e., for a hospitalization.
        xv. **Code (optional)
        xvi. *Region (optional): The region in which the client receives services, as designated by the funding source.
        xvii. *Guardian (optional): Client's guardian name if the client is not his or her guardian
        xviii. *Fee (optional): The fee charged to the program for serving the client
        xix. *Primary Diagnosis (optional): The ICD-10 code that enables the client's eligibility for service, as required by some funding sources.
        xx. *Cost Share (optional): The client's responsibility for payment toward services
        xxi. Enable Caregiver Rating Emails (optional): If checked the client and/or guardian will receive emails to rate their experience with their caregiver.
        xxii. Enable Care Management (optional): If checked the client will be available in the care management module for a plan of care and goal tracking.
        xxiii. Enable Vendor Payment (FI mode only - optional): If checked the client will be eligible to make vendor payments.
        xxiv. Enable Employer Reimbursement (FI mode only - optional): If checked the client will be eligible for reimbursements.
    d. Click **Next**
    e. EVV Location tab:
        i. Copy from Profile Address (optional): Copy the address from the basic demographics tab of the form.
        ii. EVV Location Name **(required if completing the form)**: The name of the location, i.e., home.
        iii. EVV Location Type **(required if completing the form)**: Select from drop-down
        iv. Address **(required if completing the form)**: The location address
        v. Country **(required if completing the form)**

vi. Phone Number (optional): Required for Phone EVV
vii. Phone Verified **(required):** Select yes or no, has the phone number been verified for Phone EVV?
viii. Phone Type (optional)
ix. Phone Carrier (optional)
x. Begin Date **(required if completing form)**: The first date the location is approved for use
xi. End Date (optional): The last date the location is approved if known.
xii. Status **(required):** Select from the drop-down.
xiii. Primary (optional): Select if this is the primary location to receive services

f. Click **Next**
g. Authentication Information tab:
   i. Enable Client Login (optional): Required if client portal sign-off will be used for EVV. If enabled, DCI will send a system-generated email (sender email address is: support@dcisoftware.com) to the email address on the client profile. This email must be validated.
      1. Password **(required)**: Enter a temporary password. Hover over the white "i" (information) for password requirements. The client will be prompted to change their password when they log in.
      2. Confirm Password **(required)**: Enter the same as above to confirm.
      3. Pin **(required)**: Can be used instead of a password on mobile devices.
   ii. Username (optional to change): Will be used by the client for all future logins.
   iii. Authentication Status: Defaults to active if enable client login is checked. Defaults to disabled if enable client login is not checked.
h. Click **Next**

6. Review client information, click **Save** to continue, and **Yes** to confirm.

View, Edit, or Deactivate Client Profile

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Enter the client's name in the filter and click **Search**
5. **Click anywhere in the client row** to open the Client Details page
6. Click **Actions**
7. Select **Edit Client** from the drop-down menu
8. View and make edits in the Edit Client form wizard
   a. To deactivate the client profile, change the status to **Inactive** on the basic demographics tab.
9. Click **Save** and **Yes** to confirm

Related articles

- Authorizations - Overview
- Reimbursement - Client Creates Reimbursement Entry - FI Mode Only
- Attestation (*EVV) Workflow for Clients and Guardians
- Client - FOB Attestation (*EVV)
- How do I add a signature and/or picture to my client profile via the mobile app?