

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?](#)