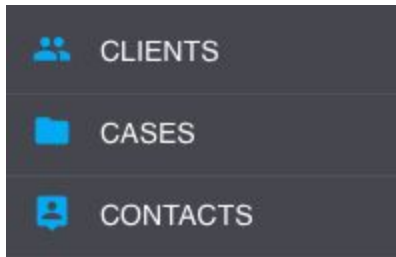


SCENARIO 1: NEW CLIENT INTAKE

A new client, Joseph Hamilton, comes into the office. You'll need to add him into Probatum, since he has no previous cases in the database. Follow the steps below and add him as a new client intake with the information provided.

Create Client Record

1) Navigate to the **Client list**. This can be found by clicking **Clients** on the Home screen (this is the view that displays when you first log into Probatum).



2) Once you have successfully navigated to the Client list, Click the **“Add New”** button in the bottom right corner of the screen.



3) You will see a message instructing you to enter the client information as prompted. Click **“Start”** to begin the intake process.

4) When the New Client form opens, enter the client's **first, middle, and last names** as well as a **name suffix** if applicable. (Note: **first name** and **last name** are the only items *required* to add a new client.) When you are finished, click **“Next.”**

Name: Joseph Lee Hamilton Sr.

5) You will be prompted for some of the client's personal information, such as date of birth (formatted M/D/YYYY) and social security number, as well as some client indicators (U.S. Citizen, Sex Offender, Drug Addiction, etc.). When you have finished, click **“Next.”**

DOB: 10/15/1975

Birthplace: Pleasantville, Ohio

SSN: 111-22-3333

Gender: Male

US Citizen: Yes

(additional information continued on next page)

Sex Offender: No
Alcohol Addiction: Yes
Drug Addiction: No
Mental Health: Yes
Gang History: No

6) You will then be prompted to add some descriptive information about the client. When you have finished, click “**Next.**”

Race: Caucasian
Complexion: Fair
Height: 6’2”
Weight: 220
Shoe Size: 11
Eye Color: Blue
Hair Color: Brown
Marks/Scars: Tattoo on left shoulder

7) This completes the client intake segment. Click “**Save.**”

8) At this point, you can choose to either exit to the new client’s profile, or continue to add a new case for the client. For this scenario, click “**Exit to Profile**” so we can continue to enter more information about Joseph.


9) Once you have reached Joseph’s profile, you will notice the blue client toolbar at the top of the screen. All of the information that you entered in the previous steps now appears in the *Client Details* section. Let’s take a quick look at the other items to further complete the client’s profile.



Add a Client Photo

10) Click *Photos* in the client toolbar, and we’ll upload a photo for Joseph. Click the “**Add New**” button in the bottom right corner of the screen.

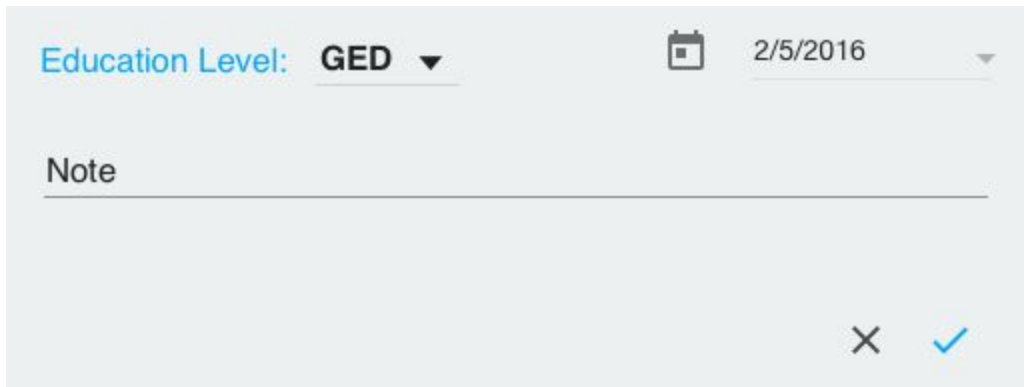


11) Click **“Select File”** and choose the photo you wish to upload. Add a **caption** if you wish, and make sure that **“Set as Primary?”** is checked if you want this to be the primary photo for Joseph. Click the checkmark icon in the top right corner to save. 

Add Marital, Dependent, and Education Information

12) Click *Family* in the client toolbar to add marital and dependent information or click *Education* to add Joseph’s education level. All of these items will be added in a similar manner.

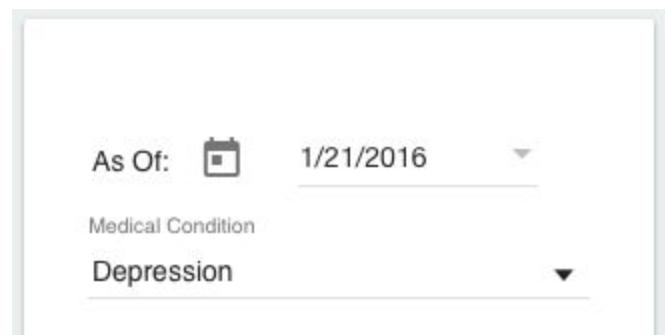
13) Click anywhere in the area labeled *Marital Status*, *Dependents*, or *Education Level*, then click **“Edit.”** Select the appropriate option from the drop down menu (or in the case of dependents, type in the text field). The **date** will default to today, but can be edited (M/D/YYYY format). Add a **note** if you wish, then click the checkmark icon to **save**.



Marital Status: Married
Dependents: 2
Education Level: GED

Add Medical Information

16) Finally, click *Medical* in the client toolbar. **Medical Conditions** and **Prescribed Medications** are both recorded here. Let’s add a medical condition for Joseph. Click the **“Add New”** button in the bottom right corner and select **“New Medical Condition.”**



17) Add the **date**, select the **medical condition** from the drop down menu, and add a **note** if you wish. Click the checkmark icon in the top right corner to **save**.



Medical Condition: Depression

This completes the client profile. In the next scenario, we'll add a case for Joseph.