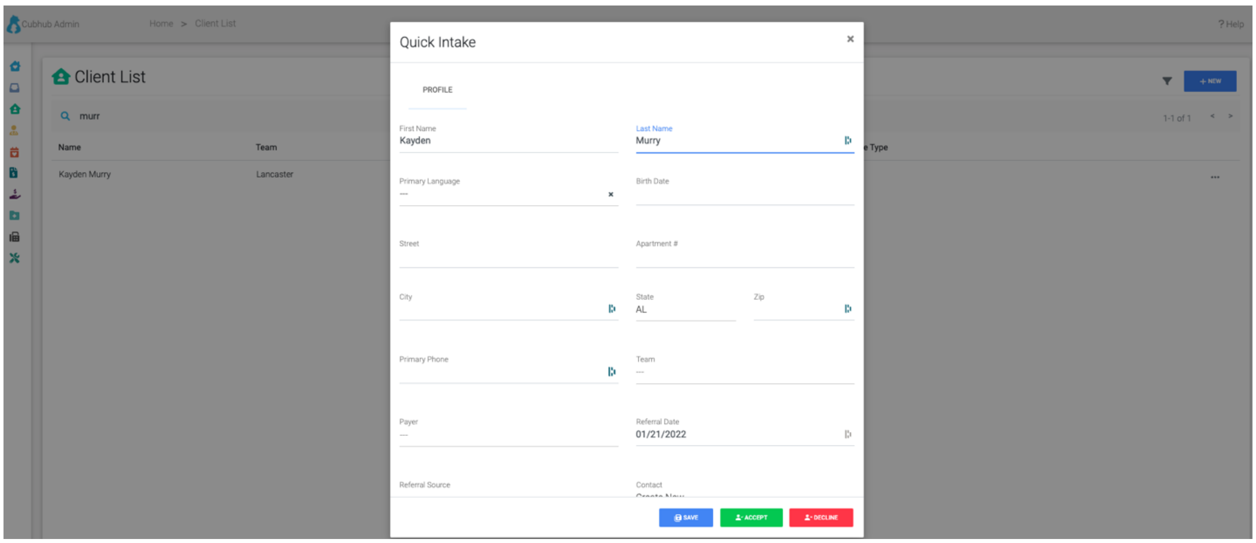
Avoiding Duplicate Clients

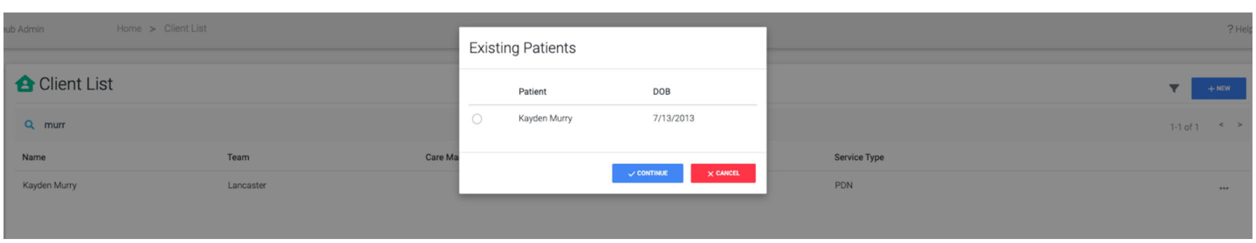
When adding a (new) client as soon as the first and last name are entered the system checks to see if they already exist.

In this example below we pulled an existing Inactive client and went ahead and tried to add them again.

When the Quick Intake modal pops up enter client first name and last and tab to next field:

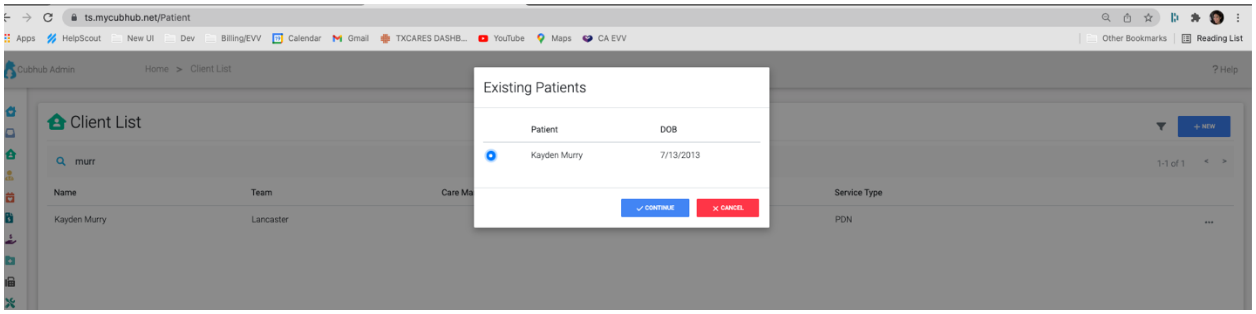


As soon as user tries to continue entering client info if the system identifies an existing client match this pop up will appear:



If it is not the same client click Cancel and the QI modal for the new client will come back up

If the client name and DOB match the user should click the circle to select and click continue



Then the quick intake for the client that already existed will be brought up to finish adding to the system and avoid duplicate client entry.