How to Guide, Mosaic Adults

Create New Client Record

1. Firstly search to ensure the client does not already exist on the system

   People > Find Person

   Enter search criteria – remember **LESS IS MORE!**

   - Same name can have different spellings / shorter versions so make sure to try a mixture of spellings. Examples include:
     - Stephen / Steven / Steve
     - David / Dave
     - Tracey / Tracy / Tracie
     - Jennifer / Jenny
     - Sarah / Sara

     There are many more so you must ensure that you do more than 1 search – use other criteria too if known, ie BOB, Address / Postcode

   - Click **Find** - a list of possible matches to your search criteria will appear – search the list thoroughly; if the client for whom you're searching is listed then no further action is needed.

   - If your client is **NOT** listed then firstly consider searching again with different criteria – see above. If you have already done this then click **Add new**

2. Add the new client details on the "Add New Person" screen which will have opened – ensure that as much info is completed as possible. Note: If the address details are not accepted in the Post codefield insert "xxx xxx" and accept "Unknown" from the dropdown. Carry on creating the new record and when complete send "sys-support-has" the new client ID number and that they add the correct address