

ADDING AN ANONYMOUS CLIENT

Before making the decision to enter a client into the *ServicePoint* database anonymously, consider collecting the client's bare minimum information (First and Last Name, Date of Birth, and Gender) and restricting the assessment and service records if you wish to keep client data confidential and private. *ServicePoint* has many security measures in place to keep a client's information safe, and it is often difficult to continue working with an anonymous client record once it is in place. Although this is not normally a recommended practice, there are some instances, such as anonymous callers, when anonymity is necessary. To add an anonymous client, complete the steps below.

Note: Creating anonymous records can result in reports that will not provide a true unduplicated count.

1. Click the *ClientPoint* tab on the navigation toolbar. The screen will refresh and display the *ClientPoint Search* screen. (See Figure 1-15)

Figure 1-15

2. Click **Add Anonymous Client** to add a client without a name and Social Security Number. (1) The **Client Profile** will display. (See Figure 1-16)

Figure 1-16

3. Note that the **Name** is populated with the Anonymous indicator. (1)
4. Complete the client information as needed.
5. At the bottom of the screen click **Save** to retain the client data and remain on the screen to continue editing the client information. Click **Save & Exit** to retain the client data and exit to the previous screen. Click **Exit** to return to the previous screen without retaining the changes.