

Standard Process for Entering Clients into CW Focus on eURN fields

<p>1. First Name</p> <p>Enter the client's full first name as it appears on their official ID</p>	<p>Generated URN Uses:</p> <p>1st Letter And 3rd Letter</p>	<p>Do Enter</p> <p>Spaces Tam Sam</p> <p>Two names Joseph Tom Bobbi Jo</p>	<p>Do NOT Enter</p> <p>Tom instead of Thomas Bill instead of William Bob instead of Robert</p>
<p>2. Last Name</p> <p>Enter the client's full last name as it appears on their official ID</p>	<p>Generated URN Uses:</p> <p>1st Letter And 3rd Letter</p>	<p>Do Enter</p> <p>Spanish Names (hyphen optional) Marquez-Iguaran de Garcia Marcos Garcia</p> <p>Hyphenated Names Johnson-Burns</p> <p>Special Characters O'Sullivan St. Marx</p> <p>Spaces Di Harmon</p>	
<p>3. Gender</p> <p>Enter the client's current self identifying gender</p>	<p>Generated URN Uses:</p> <p>Male = 1 Female = 2 Trans Unknown = 3 Trans MtF = 4 Trans FtM = 5 Refused to Report = 6 Unknown = 9</p>	<p>Note</p> <p>Please educate clients to use the same gender at each agency. This is important so each agency can access the correct client record in CW.</p>	
<p>4. Birth Date</p> <p>Enter the client's full birth date as it appears on their official ID</p>	<p>Generated URN Uses:</p> <p>Month = xx Day = xx Year = xx</p>	<p>Do Enter</p> <p>02/05/1986</p>	<p>Do NOT Enter</p> <p>2/5/86</p>

5. Alias Enter the client's other names	Generated URN Uses: NA	Do Enter Former name Goes by name Street name	
Sex at Birth Enter the client's birth gender IF NOT auto populated correctly	Generated URN Uses: NA		

Spanish Names:

Helpful Tip: On your intake form you may want to have a separate space to enter First Name and Middle Name and Last Name instead of one space for Name.

Spanish names are different than English names. Individuals from a Spanish background may or may not use the traditional naming convention.

Traditional Naming Convention

In the traditional convention individuals do not use words like "middle name" or "last name". They use the word "surname" or "family name".

Here is how a child is named.

Dad: Jose Garcia Hernandez
Mom: Rosa Ruiz Velasquez
Child: Audifas Garcia Ruiz

Here is how that name translates into CW

Hispanic Name

1st First name
1st Surname (Father's Last Name)
2nd Surname (Mother's Last Name)

CW Field

First Name
Last Name (will be used to generate eURN)
- Last Name (hyphen optional)

Example 1:

This is how you enter this client's information into CW:
Audifas Garcia Ruiz

CW Field

First Name:
Middle Name:
Last Name:

Value

Audifas

Garcia Ruiz OR Garcia-Ruiz

Non-traditional Naming Convention

For individuals who do not use the traditional convention they may take their 1st surname as their middle name or have a middle name and keep both their 1st and 2nd surnames.

Example 1:

This is how you enter this client's information into CW:

Luisa Santiago Marquez-Iguaran de Garcia

<u>CW Field</u>	<u>Value</u>
First Name:	Luisa
Middle Name:	Santiago
Last Name:	Marquez-Iguaran de Garcia OR Marquez Iguaran de Garcia

Example 2:

This is how you enter this client's information into CW:

Jose Diaz Rodriguez

<u>CW Field</u>	<u>Value</u>
First Name:	Jose
Middle Name:	Diaz
Last Name:	Rodriguez

How to Add a new Client based on the information you collect from the client

The 'Add Client' form contains the following fields and callouts:

- 1**: Last Name field
- 2**: First Name field
- 3**: Gender dropdown menu
- 4**: BirthDate field
- 5**: Alias field

Other fields include Middle Name, Estimated? checkbox, and Generated URN.

Example 1: client is transgendered with an official name change

ID Reads: **Daisy Duck**
 2/5/1983
 Male

Client reports: Self identifies as **female**
 Her previous name was **daffy duck**

eURN: **DI DC 020583 2 U**

Add Client Screen

The 'Add Client' form is populated with the following information:

- Generated URN: DIDC0205832U
- Last Name: Duck
- First Name: Daisy
- Middle Name: (empty)
- Gender: Female
- BirthDate: 02/05/1983
- Estimated?: (unchecked)
- Alias: formerly daffy duck

Demographic Tab

The 'Demographic Tab' shows the following information:

- Client URN: DIDC0205832U
- Encrypted URN: cvaNjanRY
- First Name: Daisy
- Last Name: Duck
- Gender: Female
- Date of Birth: 2/5/1983
- Sex at Birth: Female
- Encrypted UCI: F87B02C9A73791612D35852646D6ECD95DAC3190U
- Alias: formerly daffy duck

Note: CW will auto populate the Birth Gender field, in this example, update the Birth Gender to Male

The 'Demographic Tab' shows the 'Sex at Birth' dropdown menu highlighted in red, currently set to 'Female'.

The 'Demographic Tab' shows the 'Sex at Birth' dropdown menu highlighted in red, updated to 'Male'.

Add Client

Generated URN: []

1 Last Name: [] First Name: []

Middle Name: [] 3 Gender: []

4 BirthDate: [] Estimated? 5 Alias: []

Forms [Add Client] [Cancel]

Example 2: client is transgendered without an official name change

ID Reads: **Daffy Duck**
 2/5/1983
 Male

Client reports: Self identifies as **female**
 Would like to be called **Daisy**

eURN: **DF DC 020583 2 U**

Add Client Screen

Add Client

Generated URN: DFDC0205832U

Last Name: Duck First Name: Daffy

Middle Name: [] Gender: Female

BirthDate: 02/05/1983 Estimated? Alias: Goes by Daisy

Forms [Add Client] [Cancel]

Demographic Tab

First Name: Daffy Middle Name: [] Client URN: DFDC0205832U

Last Name: Duck Encrypted URN: 098geP5T0

Gender: Female Date of Birth: 2/5/1983 Est?

Sex at Birth: Female Encrypted UCI: 859E7414C686DA5583E88109B17DCACCBACC9BE3U

Client ID: [] Alias: Goes by Daisy

Note: CW will auto populate the Birth Gender field, in this example, update the Birth Gender to Male

Duck, Daffy

Demographics | Service | Annual Review | Encounters | Referrals | Relations | Part A

First Name: Daffy Middle Name: [] Client URN: DFDC0205832U

Last Name: Duck Encrypted URN: 098geP5T0

Gender: Female Date of Birth: 2/5/1983 Est?

Sex at Birth: Female Encrypted UCI: 859E7414C686DA5583E88109B17DCACCBACC9BE3U

Client ID: [] Alias: Goes by Daisy

Duck, Daffy

Demographics | Service | Annual Review | Encounters | Referrals | Relations | Part A

First Name: Daffy Middle Name: [] Client URN: DFDC0205832U

Last Name: Duck Encrypted URN: 098geP5T0

Gender: Female Date of Birth: 2/5/1983 Est?

Sex at Birth: Male Encrypted UCI: 859E7414C686DA5583E88109B17DCACCBACC9BE3U

Client ID: [] Alias: Goes by Daisy