Creating Unnamed Records Guide

Use when client both disagrees to sharing their profile and/or presents as high risk

VERY RARELY will you ever use the "Add Anonymous Client" button in ClientPoint, this procedure supports adding a truly anonymous client while also supporting the deduplication process via ServicePoint.

The following adjustment can be completed by an Agency or System Administrator.

1. Admin > User Admin > User Search (Select user profile to edit)
2. Within User Profile, under 'Settings and Special Permissions' select 'Allow User to Manage only Unnamed Clients'
3. If the user also has 'Allow User to Use the CallPoint Module' selected, temporarily disable this permission.
4. Save and Exit

The user profile is now ready to manage only unnamed records for the time being.

1. After the user with the adjusted profile settings logs in, they can navigate to ClientPoint. The options for 'Search' or 'Add New Client' are no longer available to this user.
2. Enter client information directly onto this screen and select 'Add a New Unnamed Client'.
3. Select 'okay'
4. **Record the client ID# immediately, there is no way to search for this client by identifying information such as name, SS#, or DOB**
5. Lock client profile (see Securing Client Records Training for further instruction)

Once this user is complete adding the unnamed record(s), you can adjust their profile back to the previous settings. Deselect 'Allow User to Manage Only Unnamed Clients' and, if needed/previously select, reselect 'Allow User to Use the CallPoint Module'. Save and Exit when complete.

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