Adding a new client record to the interRAI software

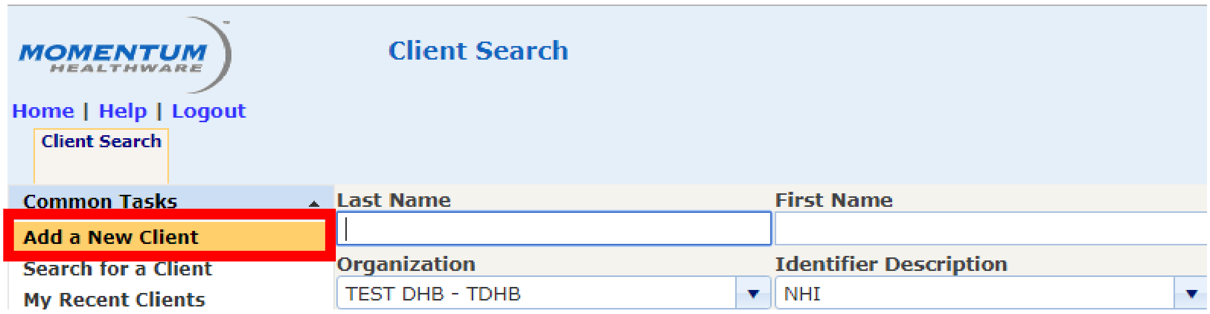
Information Sheet

Read the following information to learn how to correctly add a new client record to the interRAI software.

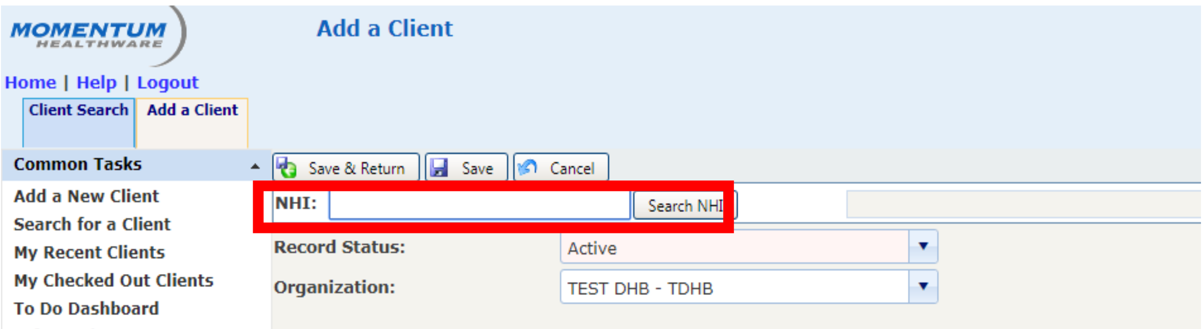
Not adding new clients correctly and not following the proper process means duplicate records being created and a disruption to data collection and your database.

How to add a new client record

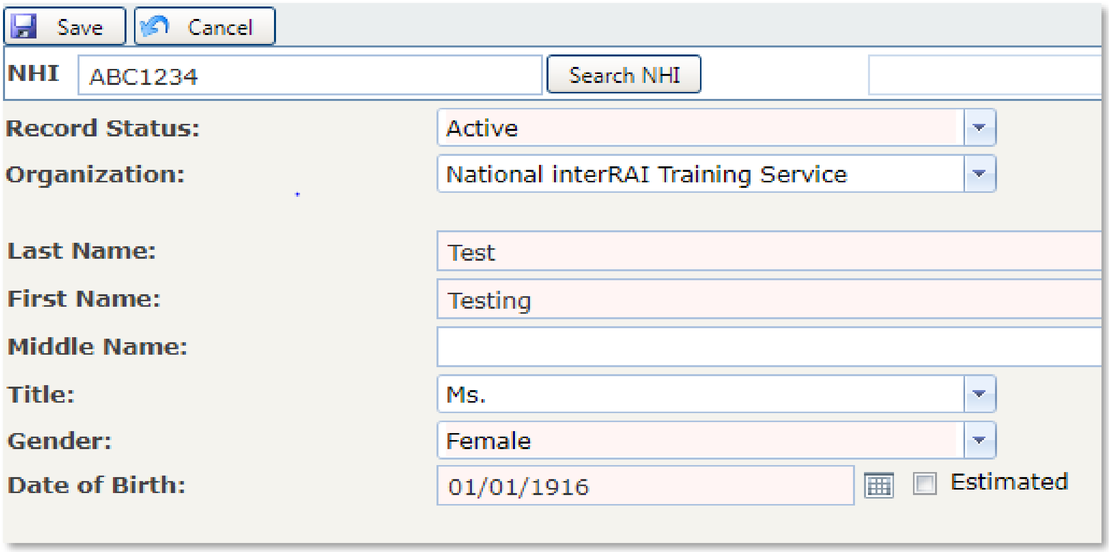
1. From the **Common Tasks** menu, click on **Add a New Client**



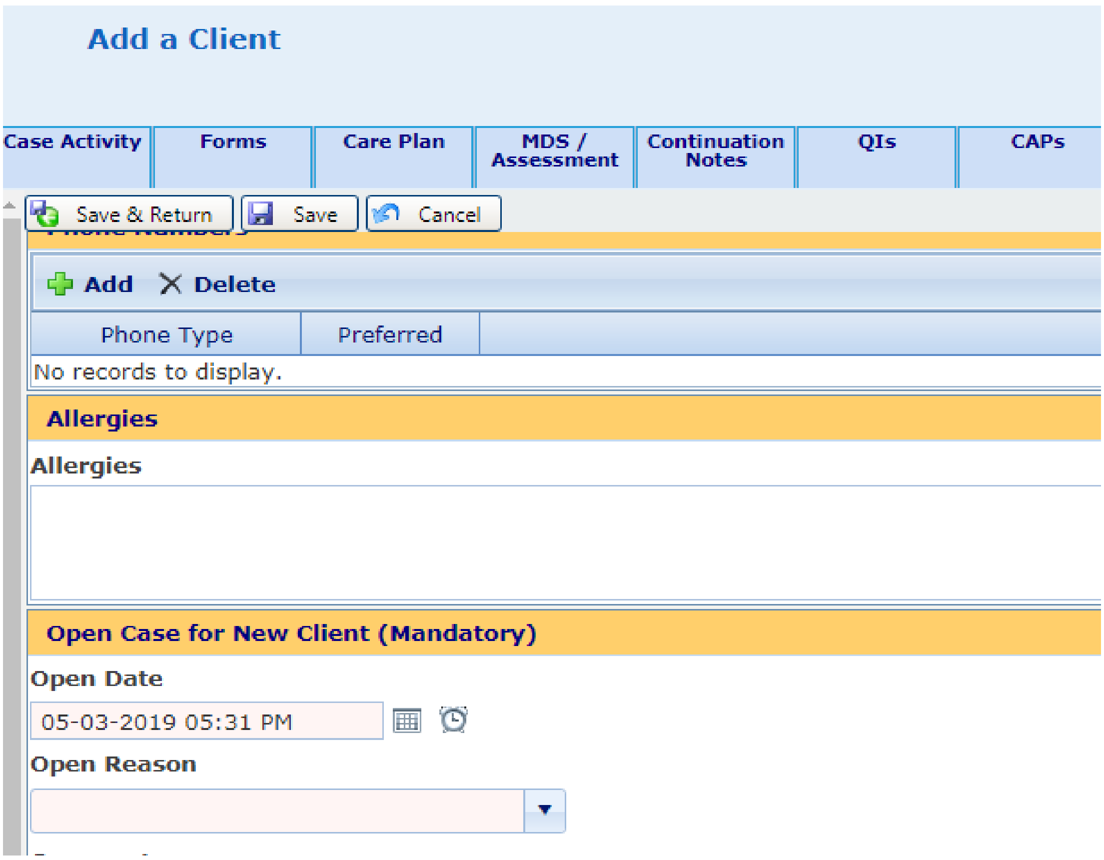
2. At the very top of the **Add a Client** screen, enter in the National Health Index (NHI) number and click on the **Search NHI** button
   Note: It is important to always use capital letters in this field



3. The ‘Search NHI’ button will link to the New Zealand Ministry of Health database and insert the name and date of birth of the person you have searched on into the interRAI software



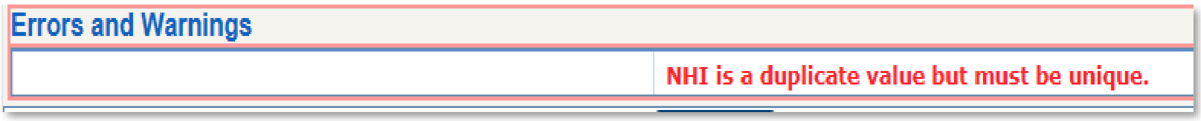
4. If the information is correct, you can scroll right to the end of the screen page to the **Open Case for New Client (Mandatory)** section



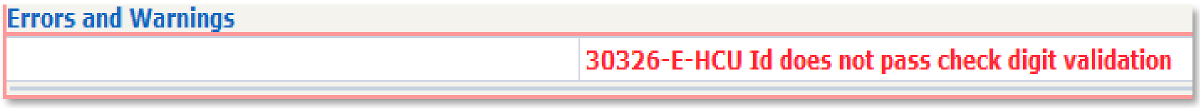
5. Add the **Open Date** and the **Open Reason**, then click on **Save & Return**
Note: Do not add any other information to any other fields

Important to note:

- The NHI search function will only accept NHI numbers (not names or dates of birth).
- Do not add a new client while you are in the **Check in/Check out** mobile software application.
- Any medical warnings and allergies held in the NHI system will automatically be entered into the **Allergies** section of the Client Overview screen.
- If the client record is already on the software, when you try to save your new record, the system will alert you with a 'duplicate NHI' error message as seen here;



- If the client's NHI is incorrect and the Search NHI link cannot locate any client information, the system will alert you with an error message as seen below;



What to do if an error message is displayed:

1. Check the NHI you have entered and correct if it is wrong.
2. Contact your local Needs Assessment Coordination centre to request the record is transferred to your organisation
3. Contact your local System Clinician if you are having difficulty adding a new client record and do not know what the problem is.