Adding a Client

Utilize these instructions to add a new client to SwyftOps

SECURITY • SPEED • SIMPLICITY

- Click Clients from the left-hand side menu, then click “+ Add New”.

- Complete the General Info page:
  - Only required entry is the name to create a new client.
  - Enter all client information possible in each section of the page.
  - The “Headline” is key information that will display on all pages of the client profile.
  - Status - use the “Intake” status to store leads of potential clients.
  - Click Save icon in the upper right-hand corner.

- Click the down arrow on the top of the page, next to “General Info”.
  - Drop down menu will appear with all profile sections to complete, proceed through each one.
  - Completing all sections is important to ensure proper scheduling, smart matching, pay, care plan, and overall effective use of SwyftOps functionalities.
  - Remember to click the Save icon in the upper-right hand corner on every page.

- To utilize advanced smart matching, complete the Client Characteristics and Caregiver Preferences area on the Scheduling page.

- Key steps - Assign care plans, record assessments or supervisory visits, enter medication administration, create schedule templates, add loved ones to Family Portal.

- Please Note: Many options that will be selected while setting up a caregiver will need to be manually added through Settings.
  - Examples – care plan, assessment and task templates, goals, facilities, departments, zones, territories, national alliances, alt. contact types.
  - To do this, go to Settings, click on the appropriate tile to edit.

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