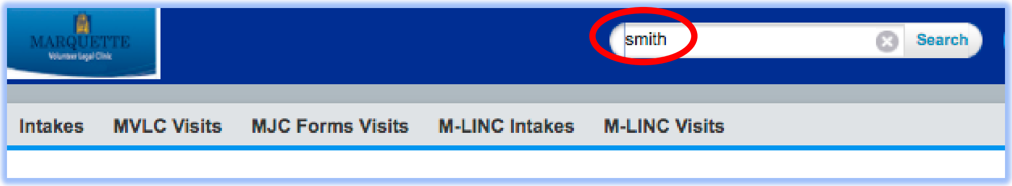
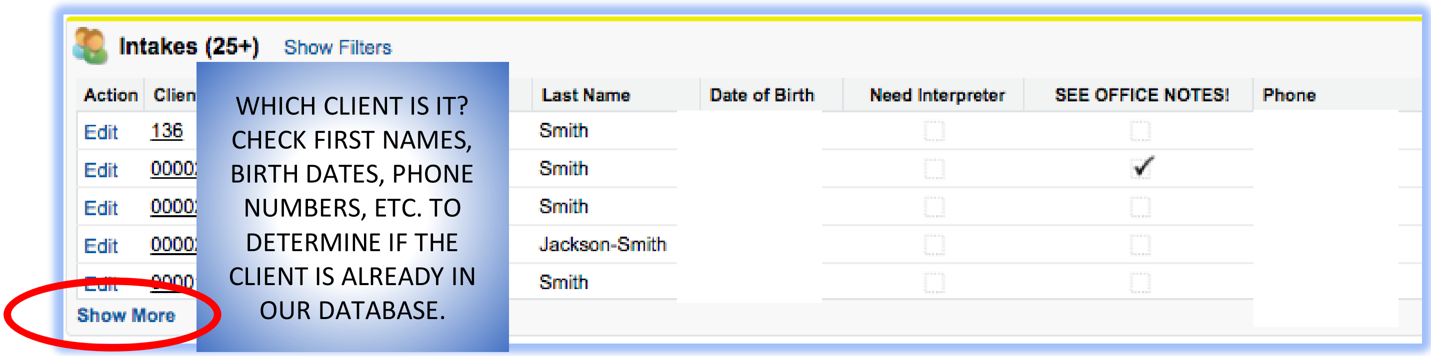
MVLC Client Database Guide for Volunteers

www.theMVLC.force.com

1. Search client last name in search bar.



2. Determine whether the client is already in the system. Click **SHOW MORE** to see additional pages of results. To see similar names, search a few letters followed by an asterisk. For example, search “Sm*” to see all names starting with those letters.

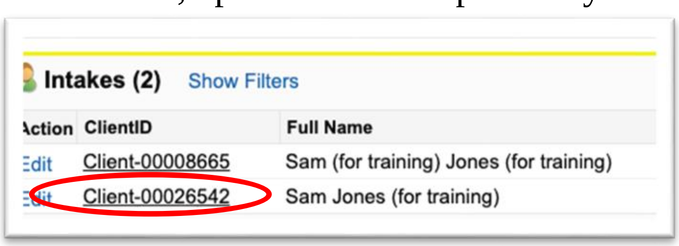


Work carefully to avoid duplicating a client that is already in the database. If you notice duplicates in the system, tell a supervisor.

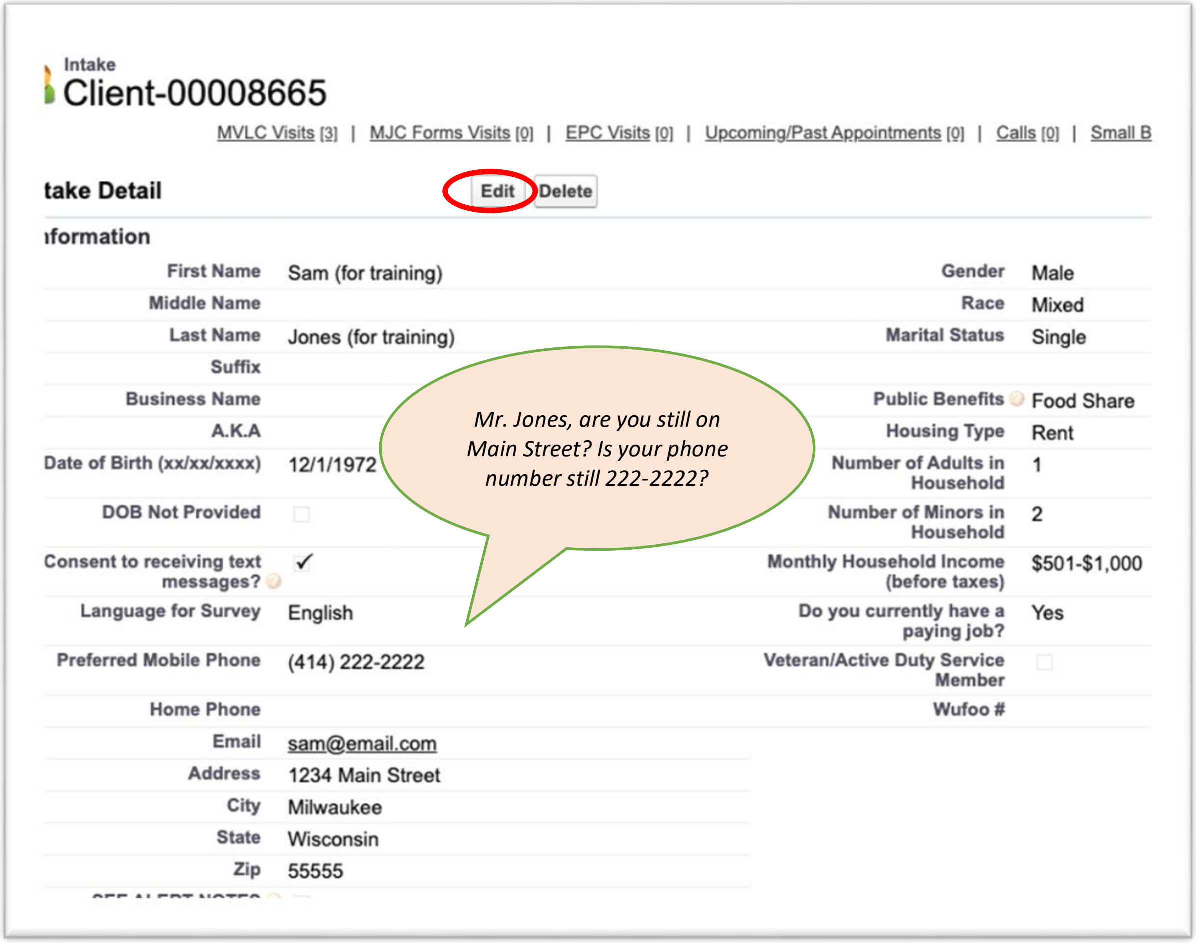
You can also search by a client’s phone number or confirm whether the client is already in the system by looking at the phone number and birth date.

If you cannot find a client, you need to make a new profile. Skip ahead to step # 6.

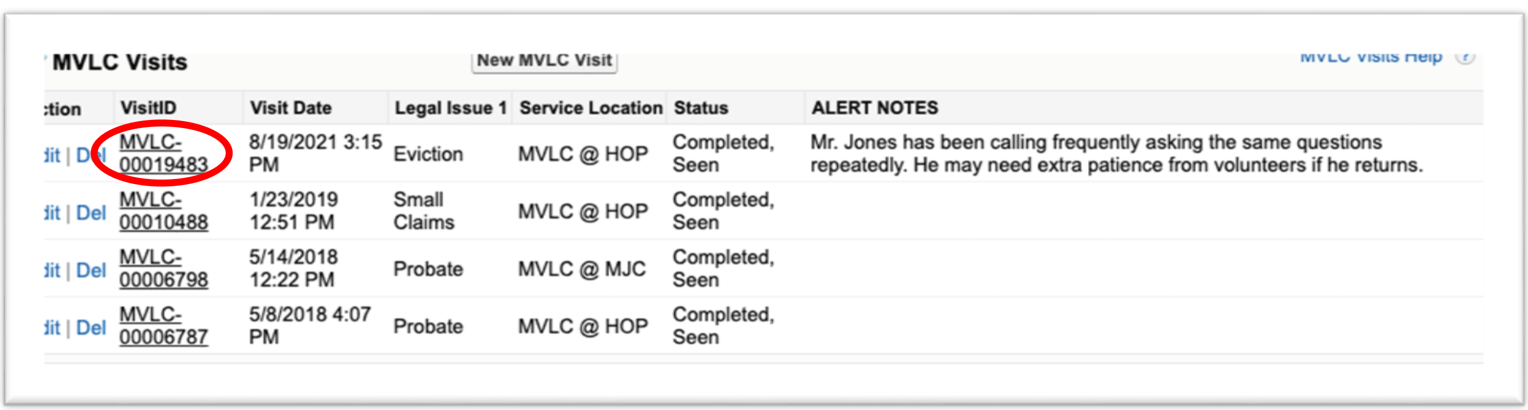
3. If the client is already in the database, open their intake profile by clicking on the Client ID.



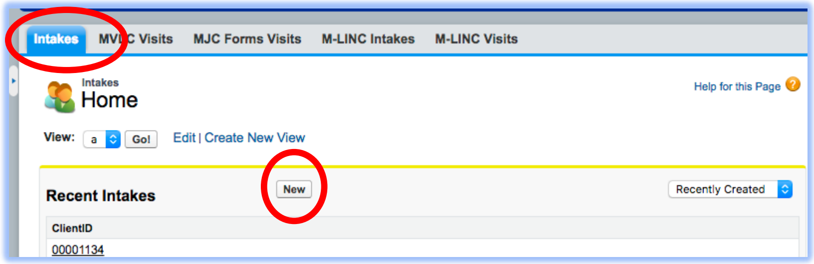
4. Confirm with the client that the information in their intake profile is still accurate. Make updates as needed using the "Edit" function.



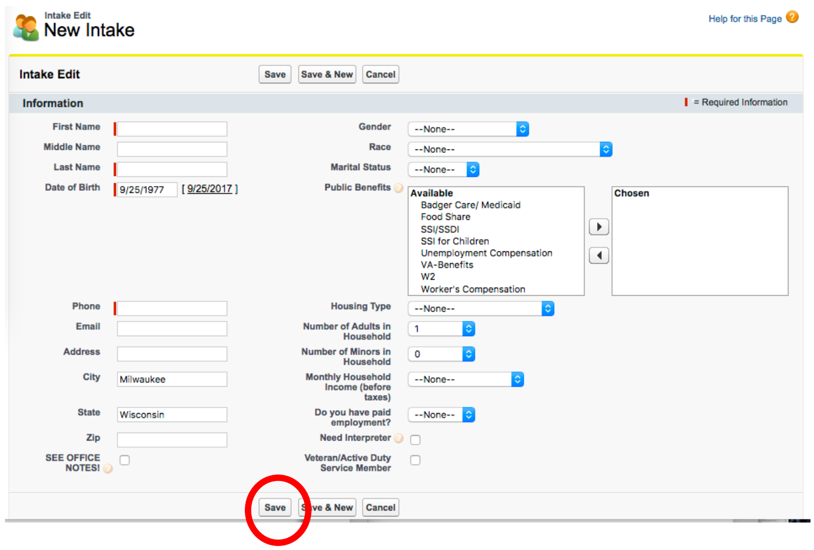
5. When a client has been here before, review their recent visit notes with the volunteer attorney by clicking on the Visit ID for each prior visit date. You may need to step away to consult with a supervisor. Then, jump to step 8.



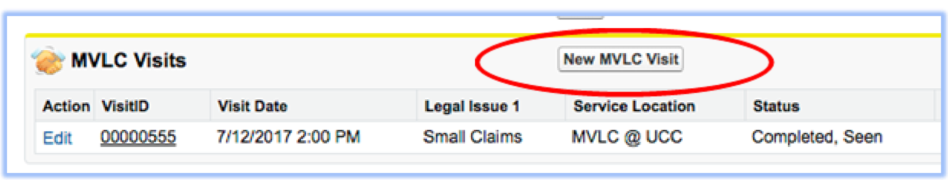
6. If the client is not in the system, create a new client. In the **INTAKE** tab, select **NEW**.



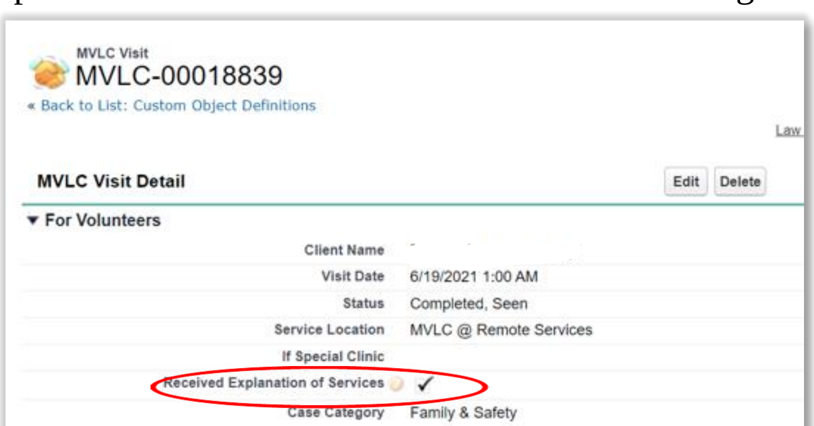
7. Enter as much data as the client would like to provide. Press **SAVE.**



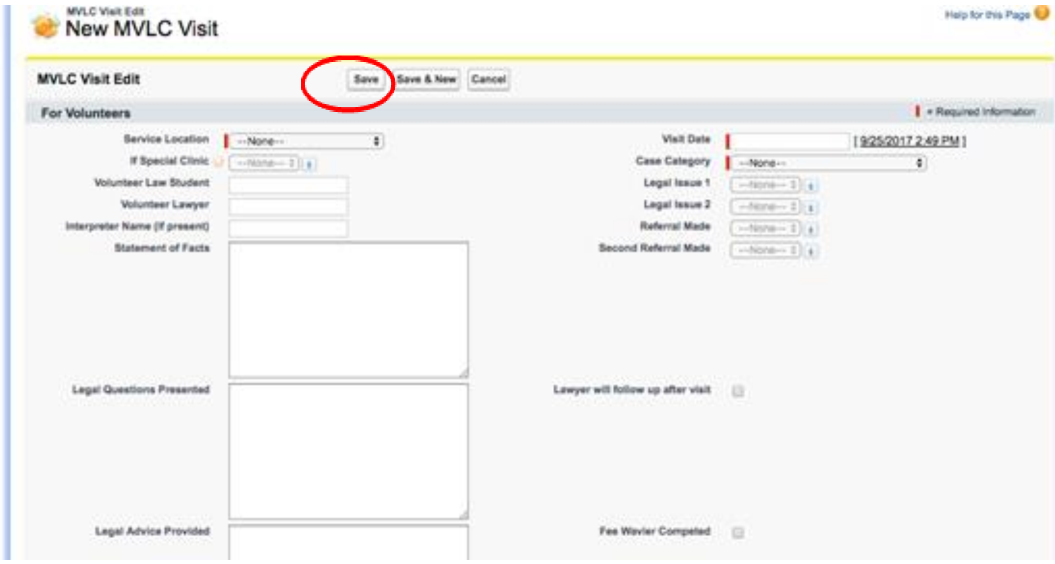
8. Select **NEW MVLC VISIT**.



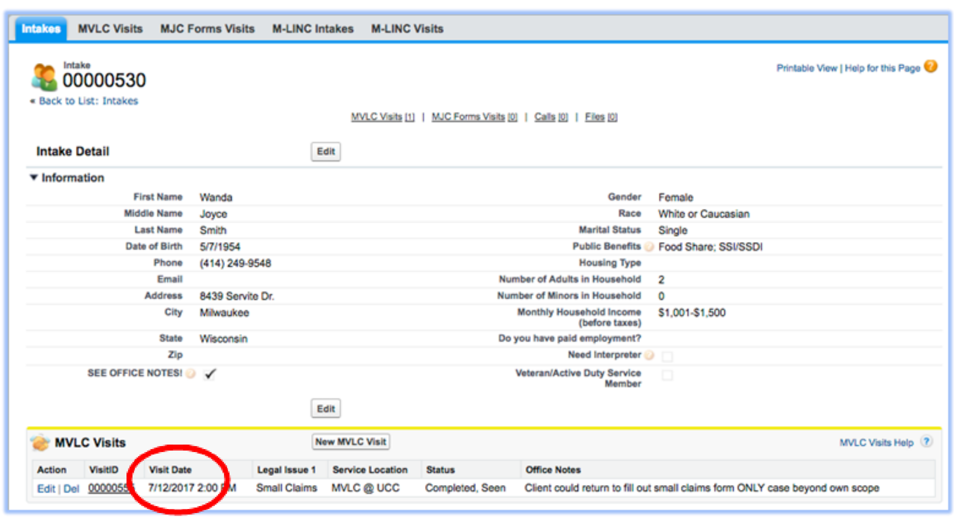
9. Review the Explanation of Clinic Services with the client. Ask if they have any questions. The client keeps the paper version. Check the box in Salesforce showing the client receive it.



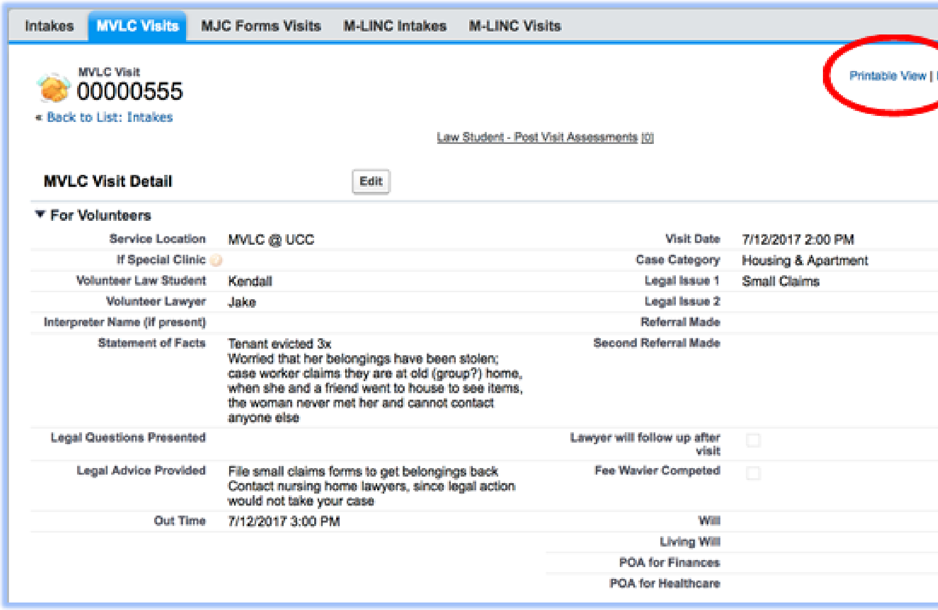
10. Take clear notes for future use by clinic staff and the client. Use the Notetaking Guide as a reference. Press **SAVE** which will allow you to see the "printable view" button.



11. Print notes for the client. After you press SAVE (as instructed above), you will **select today's visit** from the MVLC Visits list. You will now have the option to open the notes in a printable view.



12. Select **Printable View**. Take a few moments to discuss your notes with the client and provide any necessary clarifications. Print one copy for client to take with them.



13. Go back to the Intakes page. Make sure you never leave a client's information pulled up on the screen for others to see.