**Phone Calls:**

1. Initial Contact Log Bundle
	1. Type “Initial Contact Log Bundle” in **Search Forms** text box in the **Forms & Data** widget.
	2. Double click on “Initial Contact Log Bundle” in the drop down menu.

 

* 1. Enter client’s information in the search fields. (Three pieces of information is required to conduct search, unless you are searching by Social Security number or Client ID). Then click on **Search**.
	2. Click **New Client**.

 

* 1. Fill in all required data fields and other pertinent information. Then click **Submit**.



* 1. Fill in all the required and pertinent **Caller Information** then click **Submit**.

